Central Procurement Office

Agency Sourcing in Edison

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Creating New Sourcing Events

Introduction:

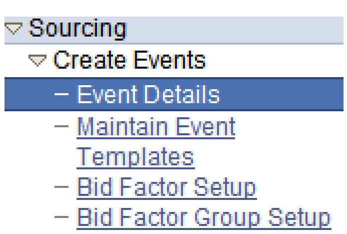
A **Sourcing Event** in Edison is a method for obtaining competitive bids and documenting information about purchases. An Event consists of:

- Basic information about what is being bought, in the "Event Name" and "Event Description" sections
- Line Item information, listing in detail what exactly is being bought. This includes Edison Item ID (if any), Item Description, Unit of Measure, NIGP Code, price and Quantity. The Line information will be copied over from the Requisition, and will also include Chart field information that is not directly visible on the Event.
- Notes and supplemental information, including Terms & Conditions, Specifications, and any descriptive attachments
- Bid Factors, which are questions that the prospective Bidder must answer that are not specifically part of bidding on a line
- Bidder information, determining who will be sent information about the Event
- Bids can be entered directly into the system via an online interface by registered Bidders, or hard-copy Bids can be entered On Behalf Of by agency personnel
- After the Bids have been recorded, the Sourcing Event is awarded to a Purchase Order.

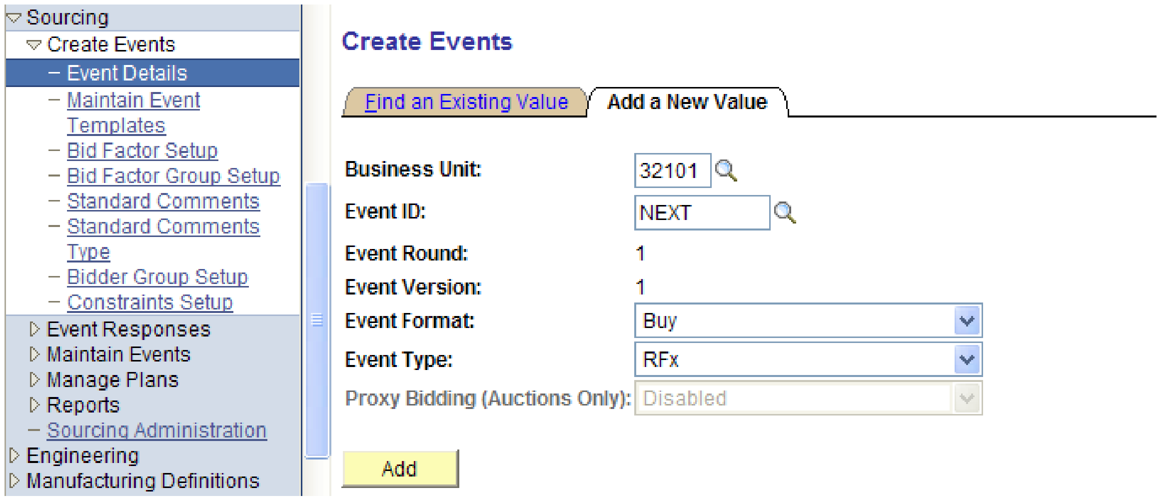
Process: *How to Create a New Sourcing Event*

Creating a new Sourcing Event begins with the Create Events page, located in the Sourcing module.

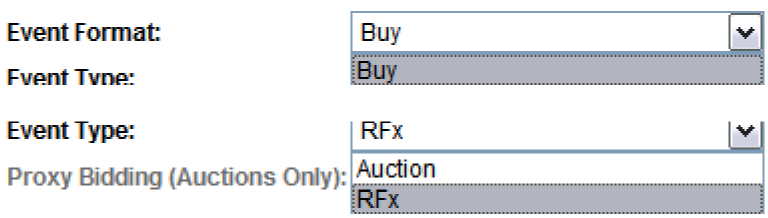
1. Select Sourcing from the main menu. Then click Create Events. From there, click the Event Details link on the left-hand side of the page.

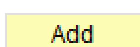


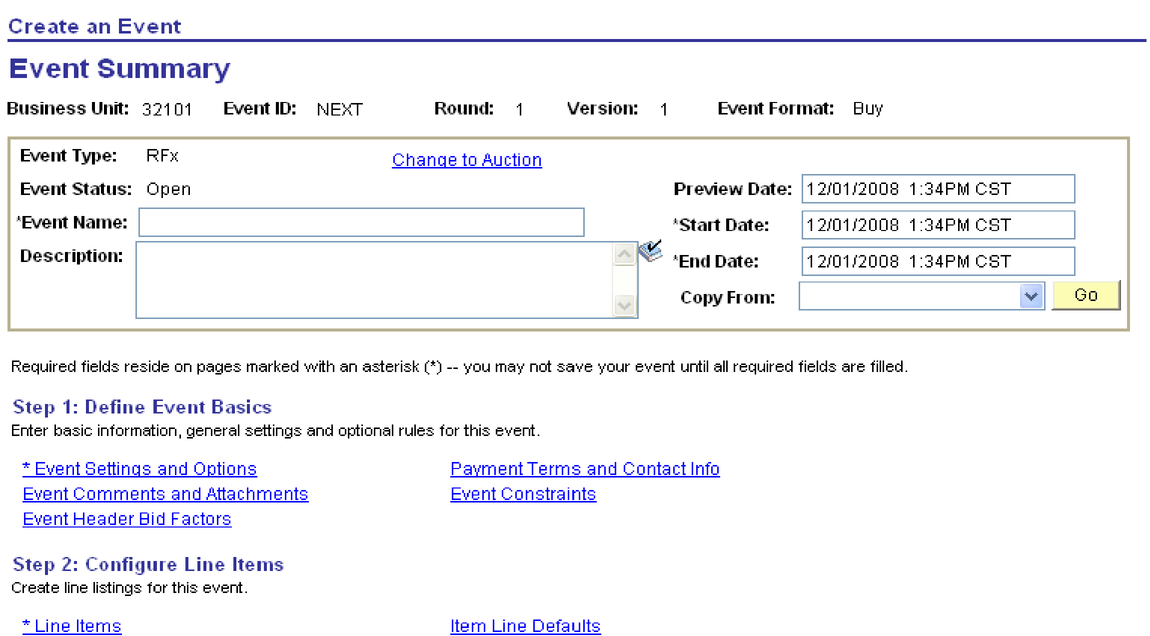
2. Clicking Event Details will bring up the **Create Events page,** shown below. The Business Unit will default in based on User Preferences. Make sure this is the correct Business Unit, meaning the same as the one on the Requisition. Leave the Event ID as NEXT, so it auto-assigns a new Event ID Number.



3. Select the Event Format and Event Type from the two drop-down menus. Select the **Buy** Event Format. Leave the Event Type as **RFx**. Examples are shown below.



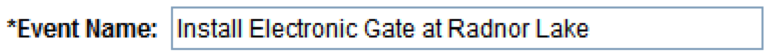
4. Click the Add button (). This will bring you to the **Create an Event: Event Summary** page.



Event Name and Description

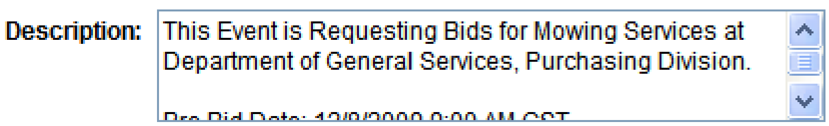
The first step on the Event Summary page is to create an Event Name and Event Description. These will be included on any solicitations sent to the vendor, so they must be clear and descriptive.

- **Event Name:** This will be the subject line of any e-mailed Solicitation sent to Bidders. To create an Event Name, click in the Event Name field and type in the name. The first 18 characters of this are what will be displayed on the Event Workbench. This must include a description of the product, the job or the main function of the contract being requested.



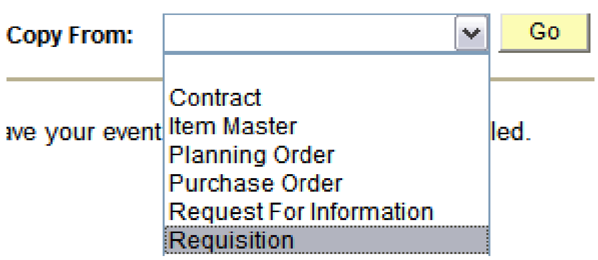
Event Description: This forms the body of any e-mailed Solicitation sent to Bidders. This will be the first thing the vendor sees on the event, and will need to be sufficient for them to know if they will want to bid.

- To create an Event Description, click in the Event Description field and type in the Description. This will need to fully describe the Event in enough detail so that any Bidder will know what they are being asked to bid on. Specifications <u>are not</u> to be included here. Examples are provided :

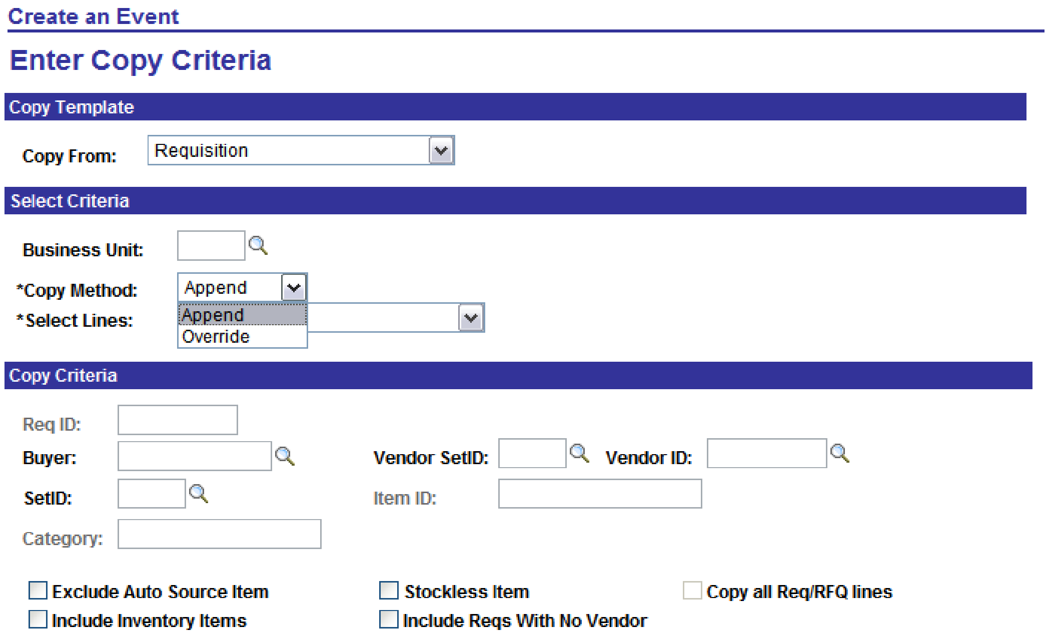


Copying Lines from a Requisition into a Sourcing Event

1. On the Event Overview page locate the "Copy From" drop-down box; select the Requisition option, as shown below. Then click the Go button.

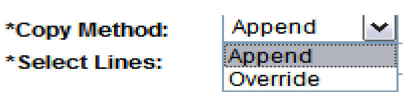


2. Clicking the Go button will bring up the screen shown below. Make sure that the **Copy From** drop-down box has Requisition selected.

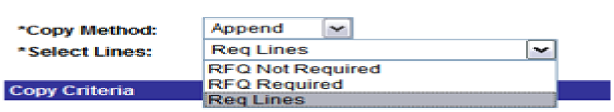


3. In the **Select Criteria** section, select the appropriate Business Unit either by using the Lookup tool () or typing it directly into the window, as shown below. It does not default.

4. Select Copy Method: Append or Override from the Copy Method drop-down. A picture of the drop-down menu is shown below. The Copy Method is used to determine what is done with the copied information. **Append** adds the information to the end of any existing line information, while **Override** saves over the existing line information, completely replacing it. *For a One-Time Purchase, choose Append when first copying.*

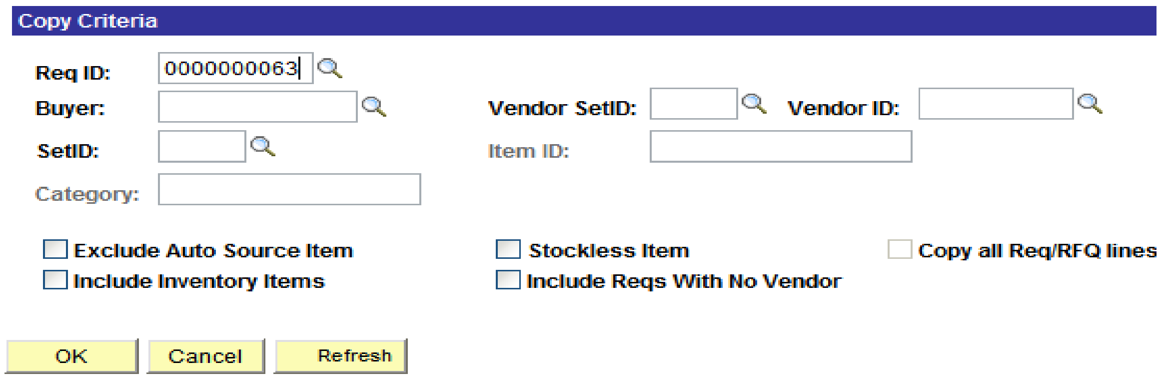


5. Next, choose the Req Lines option from the Select Lines drop-down menu. This tells the system that you want to pull information from the Requisition Lines.



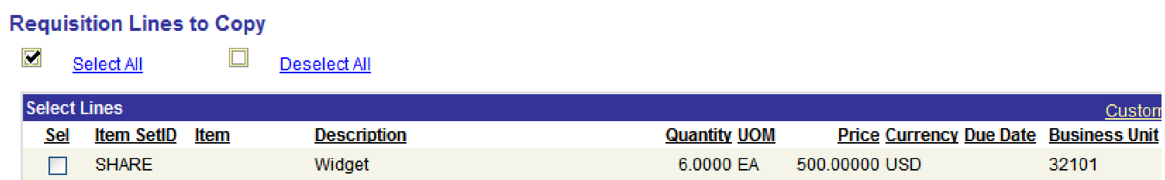
6. In the **Copy Criteria** section, you must select the Requisition ID (number) to be copied.

- Type the Requisition ID # in the Req ID field, as shown in the example.



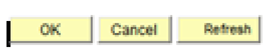
- Click the OK button OK to proceed.

7. After pressing OK, it will bring up a list of the lines that were on the Requisition selected. This is where you confirm the Requisition lines that will be copied over to the Event. See the picture below for an example.

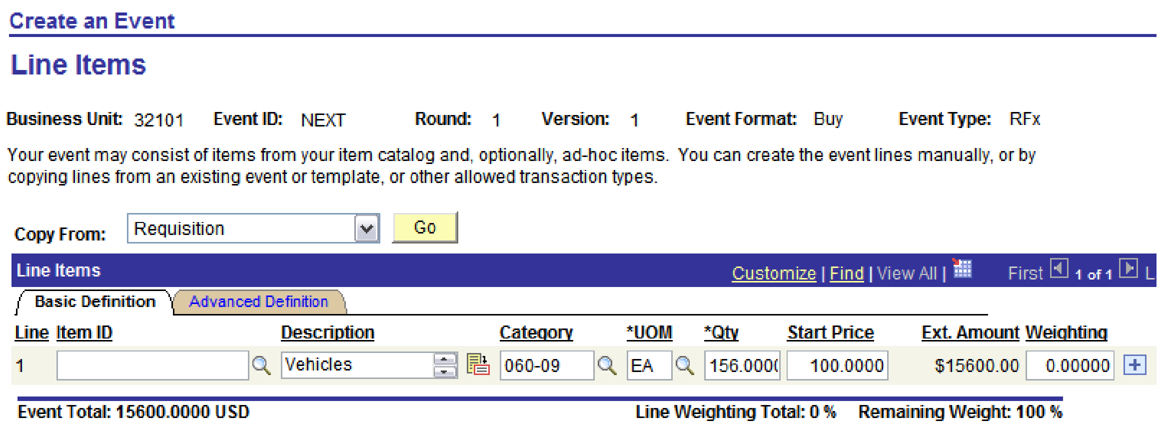


8. The Select All link (Select All) can be used to include all the lines with one click. When pressed, it will place a checkbox ( ) next to all of the lines, indicating that they will be copied. If only certain lines are needed, individual lines can be selected by checking the check box beside them.

9. Further information on the lines can be found by using the scrollbar at the bottom of the screen to scroll to the right. After all desired lines are selected; click the OK button, located below the lines.



10. Clicking the OK button will bring you to the **Create an Event: Line Items** page. This allows review of the Lines copied over in the previous steps. An example of this page is shown below.



11. After reviewing the lines, click the Save Event Changes button (Save Event Changes) at the bottom of the page.

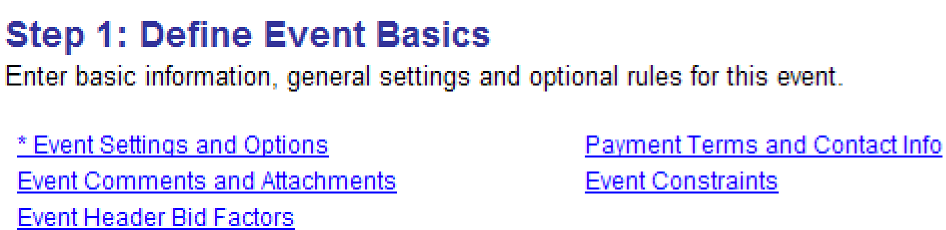
12. After saving, click the Return to Event Overview link. < Return to Event Overview

❖ When the Event is saved for the first time using the Save Event Changes button, an Event ID number will be assigned by the system. This will be shown at the top of the **Event Summary** page.

The Event Number cannot be assigned unless the Event has:

-An Event Name and Event Description
-At least 1 Line (copied from the Requisition)

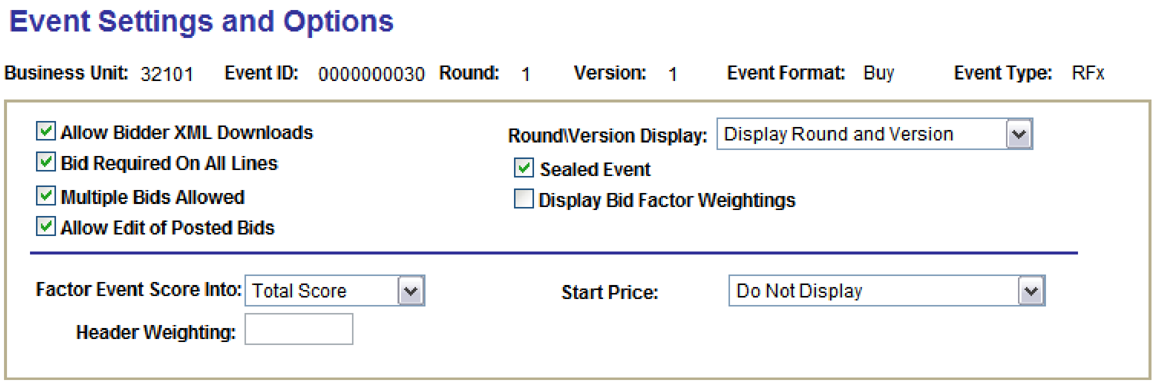
13. The next step in the Event process is to assign option preferences. This is done on the **Event Summary** page, in **Step 1 Define Event Basics.**



Begin with Event **Settings and Options**.

Event Settings and Options:

- Click the **Event Settings and Options** link (* Event Settings and Options).The list of option checkboxes is shown in the picture below with the recommended options selected, with bulleted descriptions starting underneath the picture.



- **Allow Bidder XML Downloads** is checked by default. When checked, it allows the Bidder to download the Solicitation and open it as an Excel form and fill it out electronically. **<u>Leave this checked.</u>**

- **Bid Required on All Lines** is checked by default. When checked, it requires the Bidder to submit a bid for all lines. When unchecked, it allows the Bidder to only bid on the lines they choose. **<u>Leave this checked unless you want to do Line Item Awards.</u>**

- **Multiple Bids Allowed** is *not* checked by default. When checked, this allows the same Bidder to enter multiple bids. When unchecked, the Bidder can only enter one bid. **<u>Check this box.</u>**

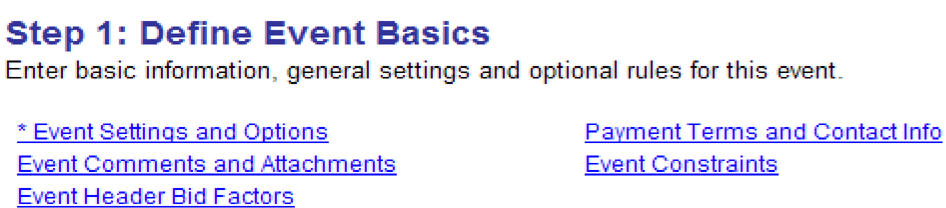
- **Allow Edit of Posted Bids** is checked by default. When checked, this allows the Bidder to edit their bids that they have already posted. **<u>Leave this checked.</u>**

- **Sealed Event** is checked by default. When checked, Bidders will not be able to see Bids that have been posted other than their own. **<u>Leave this checked.</u>**

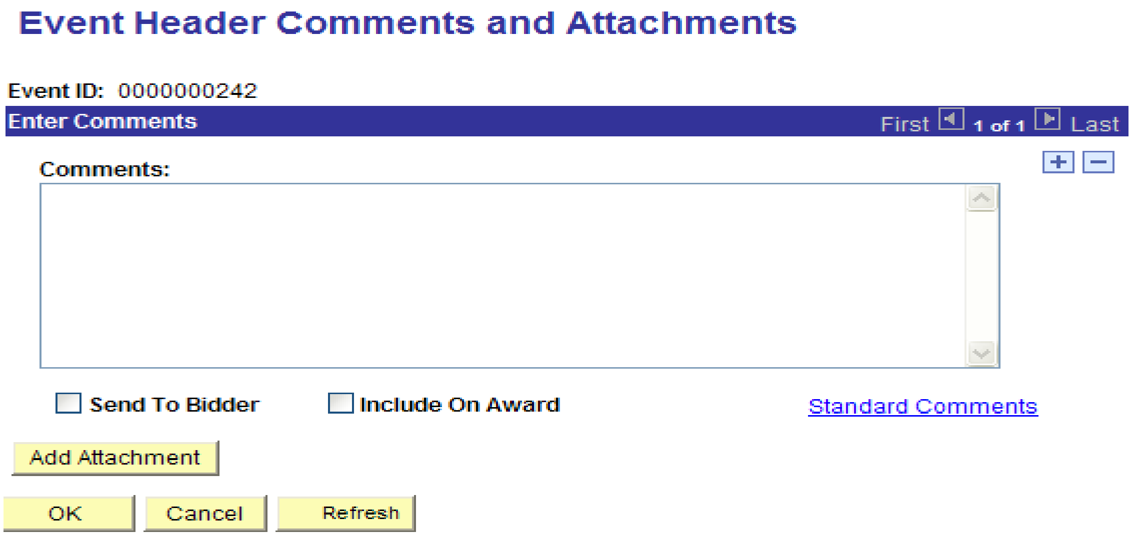
- **Display Bid Factor Weightings** is checked by default. When checked, this enables the Bidders to see how much weight is given to each question asked of them. **<u>Uncheck this box</u>**.

- **The last three options (Factor Event Score into Total Score, Start Price and Header Weighting) are not used at this time.**

After selecting the desired options, choose the **Return to Event Overview** link**.**
< Return to Event Overview This will return you to **Step 1: Define Event Basics**.



- Click the **<u>Event Comments and Attachments</u>** link. You will be taken to the **Event Header Comments and Attachments** page, as shown below.



<u>Event Header Comments and Attachments</u>

This section is used to attach supporting documents and text to the Sourcing Event. It can also be used to record internal notes.

Items in this Header section are applicable to every line on the Event. They will include:

- Specifications not specific to a line, as an Attachment
- Any documentation pertinent to the Event.

<u>Note: The comment section is limited. Having a comment that is too lengthy can cause the event to fail.</u>

<u>For all Comments:</u> Leave the box "Send to Bidder" box un-checked if you're entering a general comment.

<u>Adding Documents as Attachments</u>

Go to the Header Comments and Attachments section.

1. Documents may need to be attached using the Add Attachment button. 

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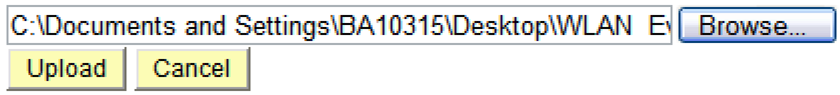
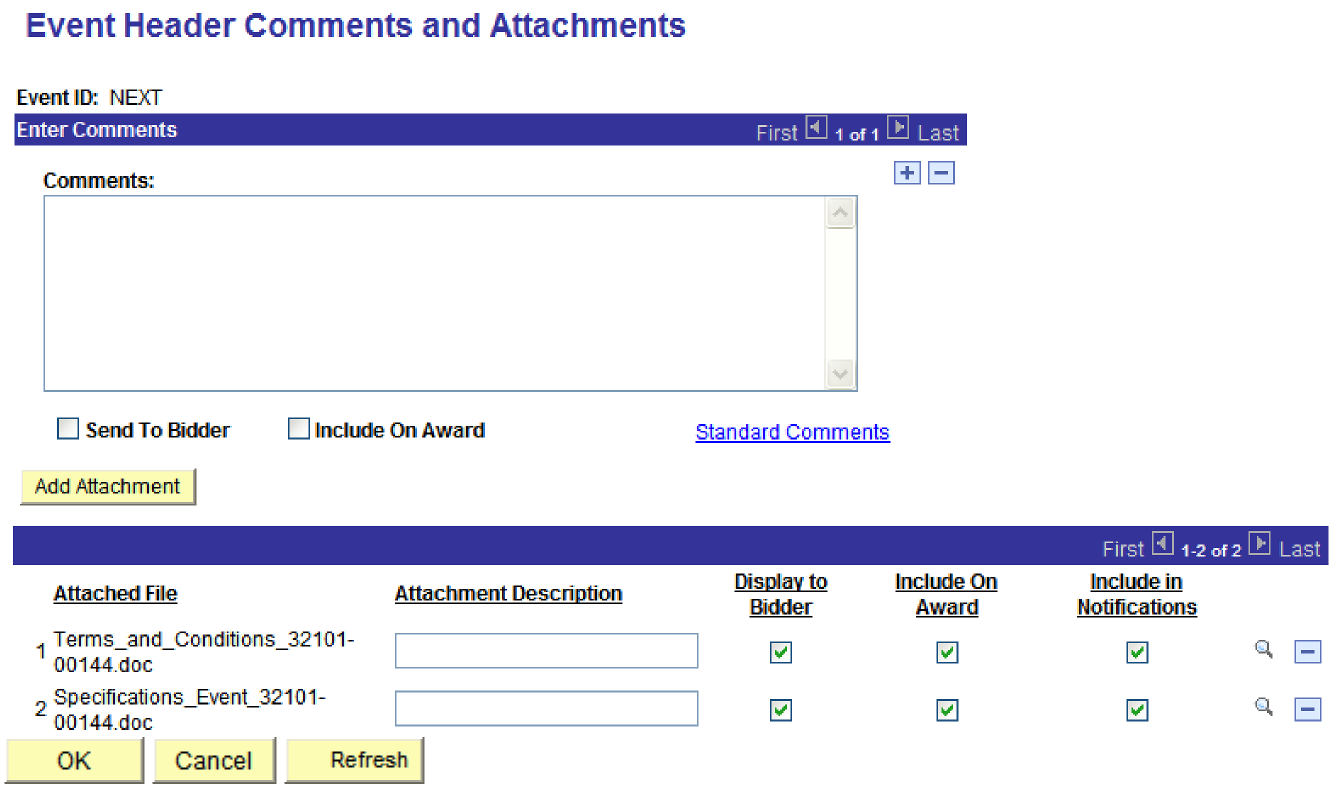
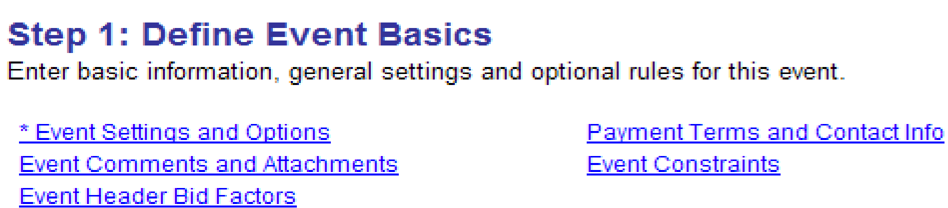
2. To add documents, click the Add Attachment button. This will bring up the screen shown in the example below. Click the browse button to locate the file to attach, and then click the Upload button.



3. After clicking Upload, you will be returned to the **Event Header Comments and Attachments** page. The attachment will be shown at the bottom, like in the picture below. **Make sure the "Display to Bidder" and "Include on Award" boxes are checked** for both the Comments box and all Attachments if you want that certain attachment displayed. Check "**Include in Notifications**" if you want that document to be included in the event notification emails to the bidders/vendors. If you just want an attachment there for audit purposes; such as comptroller approval, etc don't check these boxes.



4. Once all Attachments are added, click the OK button. This returns to the Event Overview page, **Step 1: Define Event Basics**, as shown below.



Bid Factors:

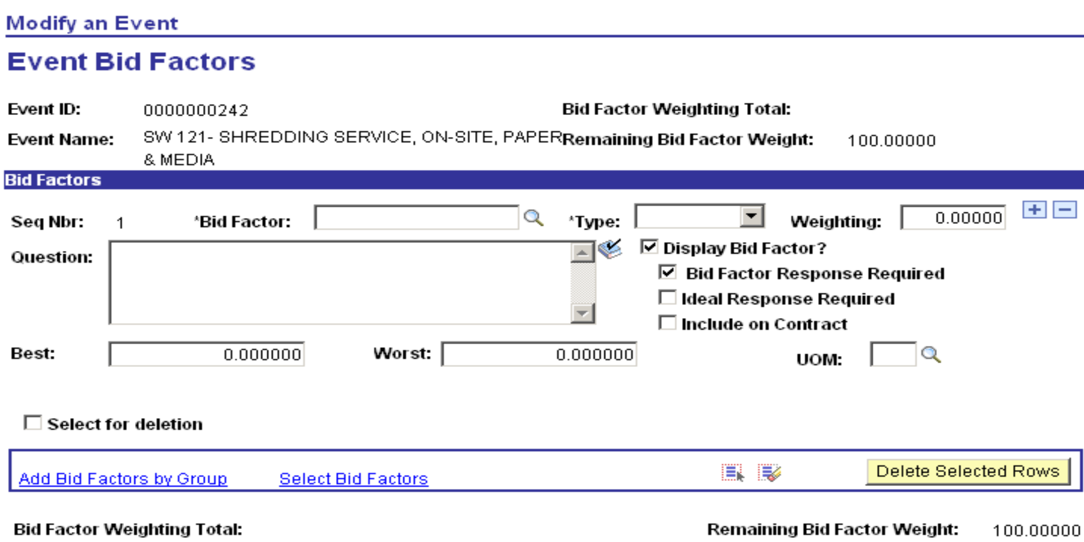
After adding all of your Attachments if there is additional information that must be obtained from the Bidder, **Bid Factors** are set up on the Event to allow you to ask questions that the Bidder can respond to.

- Within the Event, there are two places where Bid Factors can be added; at the Header level and at the Line level.
- Bid Factors at the **Header** level apply to the Event as a whole, regardless of how many lines there are. An example of a Header level Bid factor would be "Will you be using a subcontractor?"
- Bid Factors at the **Line** level apply only to the individual line. An example of a Line level Bid factor would be the Brand and Model being bid.

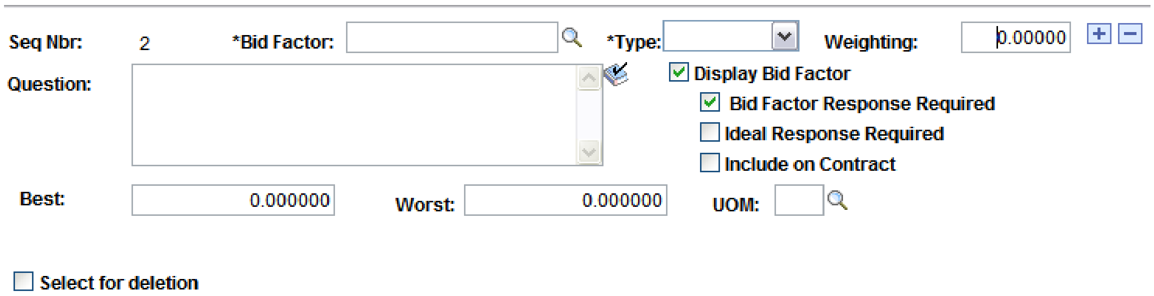
There are two ways to use Bid Factors, either by creating new ones or using saved ones. Most Bid Factors will already be saved in the system, but in special circumstances it may be necessary to create new ones.

The next step is to look through the pre-existing Bid Factors and determine which of them you must include on your Event.

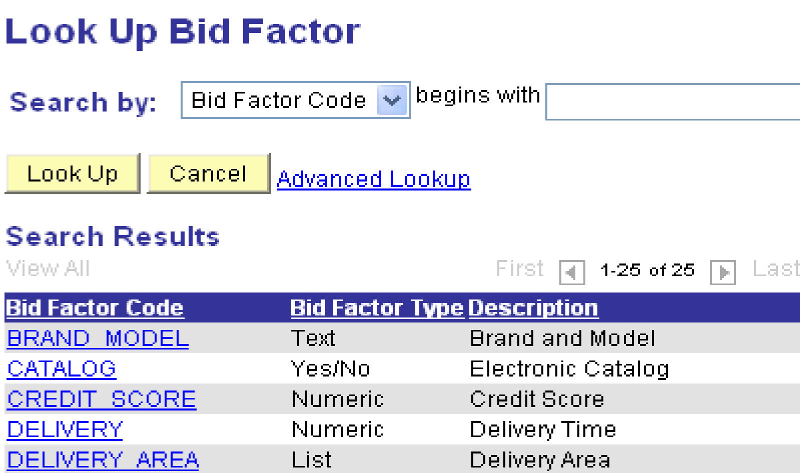
In **Step 1: Define Event Basics;** click the **Event Header Bid Factors** link. You will be taken to the **Event Bid Factors** page.



A new Bid Factor will have no data entered. To choose from the list of existing Bid Factors, click the Lookup Icon ( ) next to the Bid Factor field.

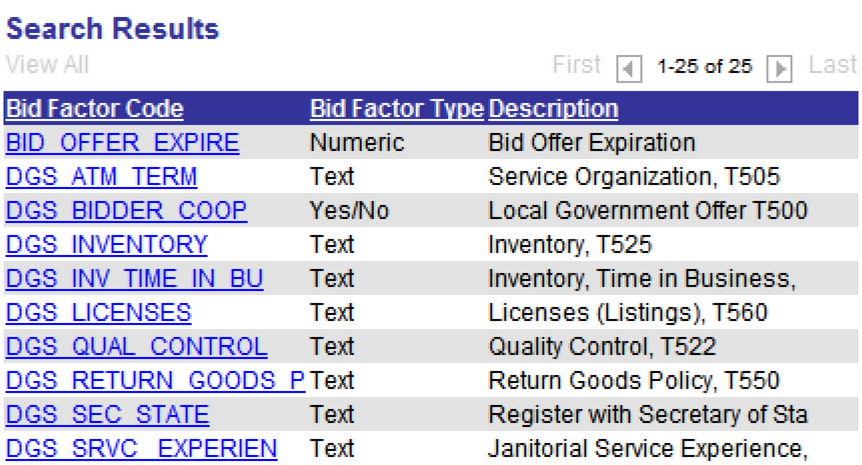


1. This brings up the list of Bid Factors. The search fields work the same as on any other page. Scroll down past the Search fields to see the list of currently-available Bid Factors.

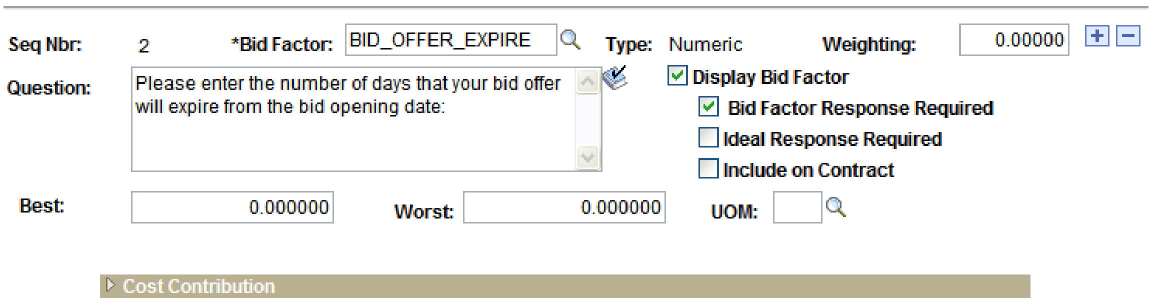


Bid Factor Code	Bid Factor Type	Description
BRAND_MODEL	Text	Brand and Model
CATALOG	Yes/No	Electronic Catalog
CREDIT_SCORE	Numeric	Credit Score
DELIVERY	Numeric	Delivery Time
DELIVERY_AREA	List	Delivery Area

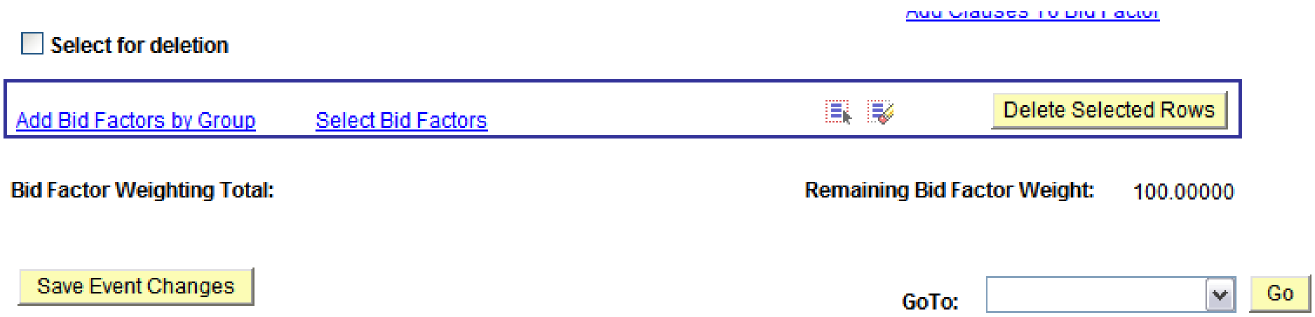
2. Click on the blue link for the Bid Factor needed. This will return you to the Bid Factor screen with the Bid Factor information populated into the field.



Bid Factor Code	Bid Factor Type	Description
BID_OFFER_EXPIRE	Numeric	Bid Offer Expiration
DGS_ATM_TERM	Text	Service Organization, T505
DGS_BIDDER_COOP	Yes/No	Local Government Offer T500
DGS_INVENTORY	Text	Inventory, T525
DGS_INV_TIME_IN_BU	Text	Inventory, Time in Business,
DGS_LICENSES	Text	Licenses (Listings), T560
DGS_QUAL_CONTROL	Text	Quality Control, T522
DGS_RETURN_GOODS_P	Text	Return Goods Policy, T550
DGS_SEC_STATE	Text	Register with Secretary of Sta
DGS_SRVC_EXPERIEN	Text	Janitorial Service Experience,

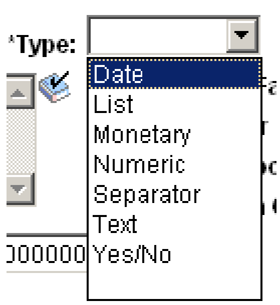


3. To add additional Bid Factors, press the plus button ( ) to create a new blank Bid Factor below the previous one entered. Repeat the process above, filling in a Bid Factor and adding a new one, for every necessary Bid Factor. Then scroll down to the bottom of the page and press the Save Event Changes button.



Adding Ad Hoc Event Header Bid Factors

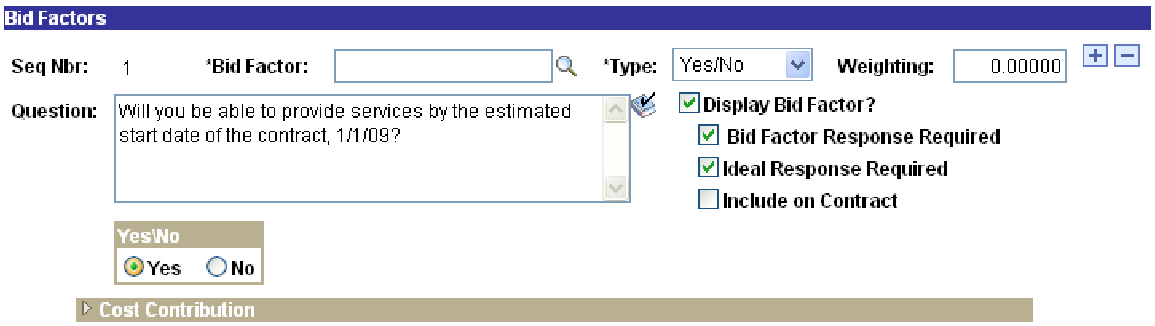
1. If you are creating an entirely new Bid Factor (Ad Hoc Bid Factor), click on the Type drop-down box. This allows selecting of the Bid Factor Type, which will determine the format the Bidder must use to answer the question. The types include:



   a. Date (for example, Contract Start Date)
   b. List (to include a List of references, for example)
   c. Monetary (Amounts of money, as in a price)
   d. Numeric (Numbers, such as Quantity)
   e. Separator (Mainly used to organize the Solicitation)
   f. Text (A free-form field to type any text response)

g. Yes/No (To limit the Bidder to a Yes or No answer.)

- An example of an Ad Hoc Bid Factor is shown below. It was created by selecting Yes/No from the type field, then typing text into the **Question** field.



2. A list of checkboxes is shown on the main page to allow more fine-tuned configuring of the Bid Factor selected.

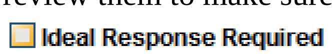
- **Display Bid Factor** is checked by default. When checked, this shows the Bid Factor on the Solicitation. **<u>This should be checked.</u>**

- **Bid Factor Response Required** is checked by default**.** This means that the bidder must answer this question in order to submit a bid electronically. If this box is unchecked, the Bidder will be able to submit a Bid without answering the question.

- **Ideal Response Required** is unchecked by default. When combined with the Ideal Response field, this allows a question to be set up to where if the Bidder does not answer with the “right” answer, they will not be able to complete the bid.

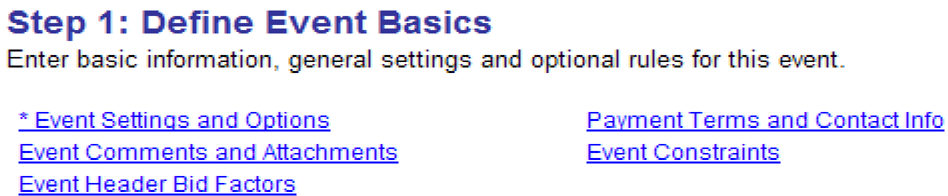
- **Include on Contract** is unchecked by default. When checked, it includes the question and the winning Bidder’s answer on the Contract.

After Adding all Bid Factors:

Once all Bid Factors are added, you must review them to make sure that **<u>NONE</u>** of them have the "Ideal Response Required" box checked. 

<u>IF THIS BOX IS CHECKED, BIDDERS MAY NOT BE ABLE TO COMPLETE THEIR BIDS!</u>

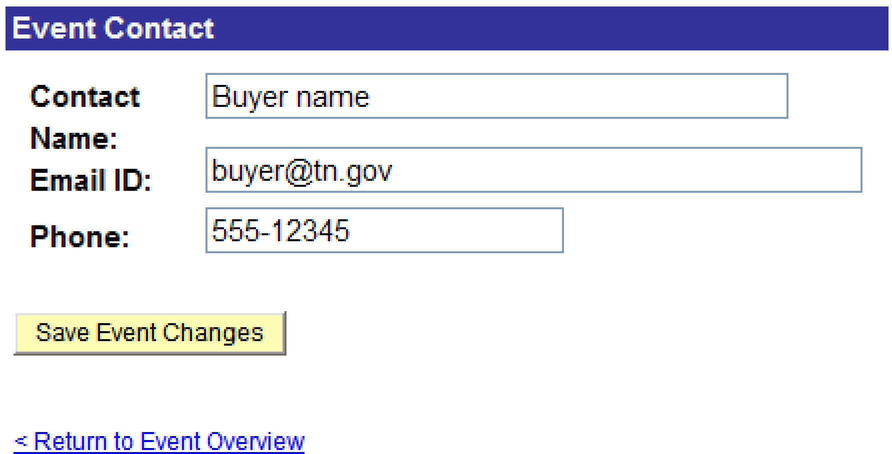
After you have verified that none of the Bid Factors have the Ideal Response Required box checked, click the Return to Event Overview link. This returns to the Event Overview page, **Step 1: Define Event Basics**, as shown below.



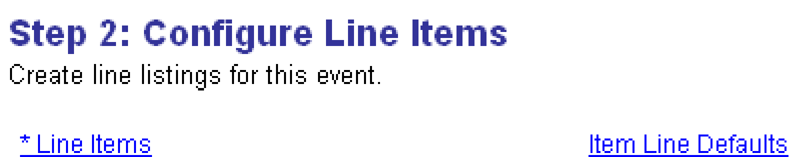
In Step 1: Define Event Basics; the only thing left to do is add the Phone Number for the Buyer, in Payment Terms and Contact Info.

Payment Terms and Contact Info

The Buyer's phone number **must** be added in this section. Click in the Phone field, type in the Buyer's Phone number, then press the Save Event Changes button. Then click on the Return to Event Overview link to go back to the main page.



Configuring Line Items



The **Configure Line Items** section is used to edit Event Lines that have been copied in from the Requisition. It can also be used to manually create new Event Lines.

1. Click the Line Items link. *Line Items This will take you to the **Line Items** screen, shown below. **The Line Items screen will display the lines copied from the Requisition.** Any necessary

changes to existing lines can be made by clicking in the field (such as the Qty) and typing in the correct value.

Line Items

Business Unit: 32101 **Event ID:** 0000000242 **Round:** 1 **Version:** 1 **Event Format:** Buy **Event Type:** RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

Line Items Customize | Find | View All | First 1-2 of 2

Basic Definition | Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	1000005112	BOATS, PEDAL	120-21	EA	1000.00(	1450.0000	$1450000.00	0.00000
2	1000005112	BOATS, PEDAL	120-21	EA	1.0000	1708.5400	$1708.54	0.00000

Event Total: 1451708.5400 USD **Line Weighting Total: 0 %** **Remaining Weight: 100 %**

2. To delete a line, click the blue minus button on that line (−).

3. To add a Line to the Event without copying it in, use the blue Plus button (+) to add a new row. This adds a row directly below the row where the Plus button was selected. If the blue Plus button is not visible, use the scrollbar to scroll to the right. An example blank row is shown below.

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
3	1000011656	FLAME RESISTANT PANTS, DEPT OF FORESTRY	999-99	EA	20.0000	82.0000	$1640.00	0.00000
4								0.00000

4. The blank line will need to have information filled in. The required fields are Description, Unit of Measure (UOM) and Quantity (Qty). The Start Price and Item ID can also be filled in if available.

5. To find if an Item ID exists for the requested item, use the Lookup tool (🔍) located by the Item ID field. This allows searching for item IDs that are already in the system. Clicking the Lookup button will pull up a menu to search by Item IDs, as shown below. Items currently on Agency or Statewide contracts will have Item IDs in the system.

Search by: Item ID begins with

Look Up Cancel Advanced Lookup

Search Results

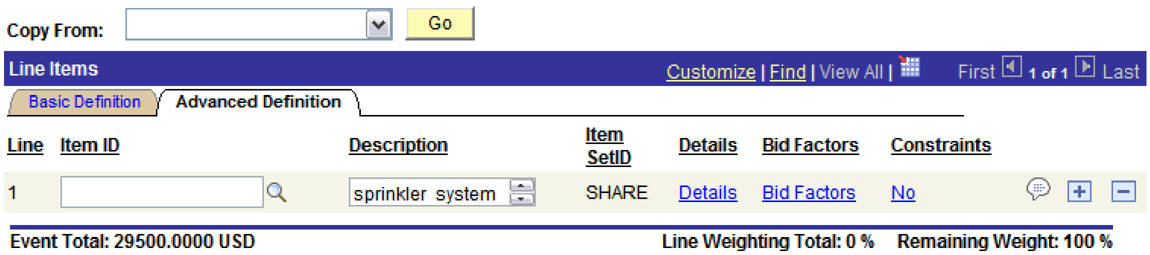
Only the first 300 results can be displayed. Enter more information above and search again to red

View All First 1-100 of 300 Last

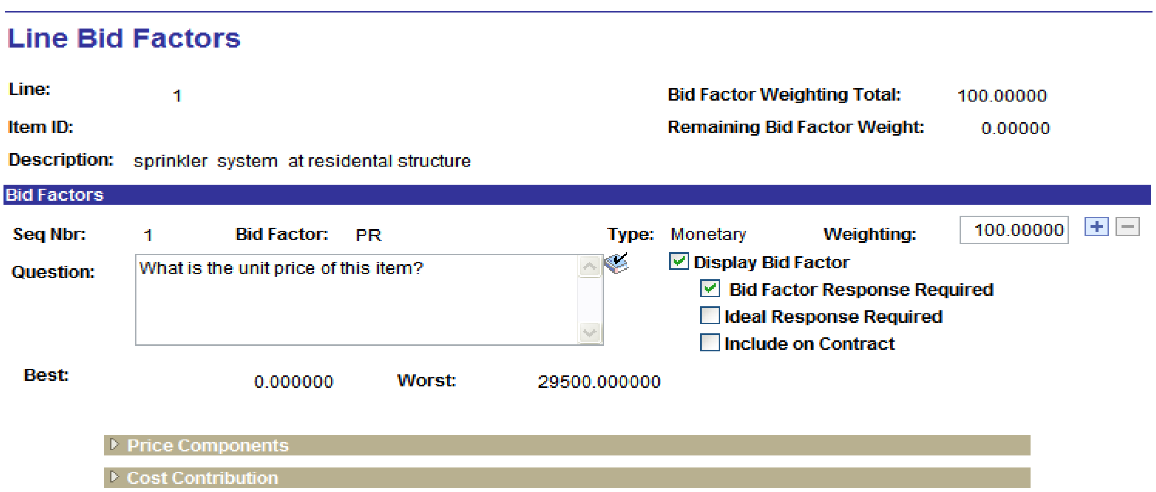
Item ID	Description	Category	Category ID	Item Group	Family
1000000001	GROUNDS MTNC, DAYTIME, CMRA DE	999-99	08518	(blank)	(blank)
1000000002	SHIRT, GUARD, SS, GREY, FEM, S	200-85	01246	250	276

Line Bid Factors

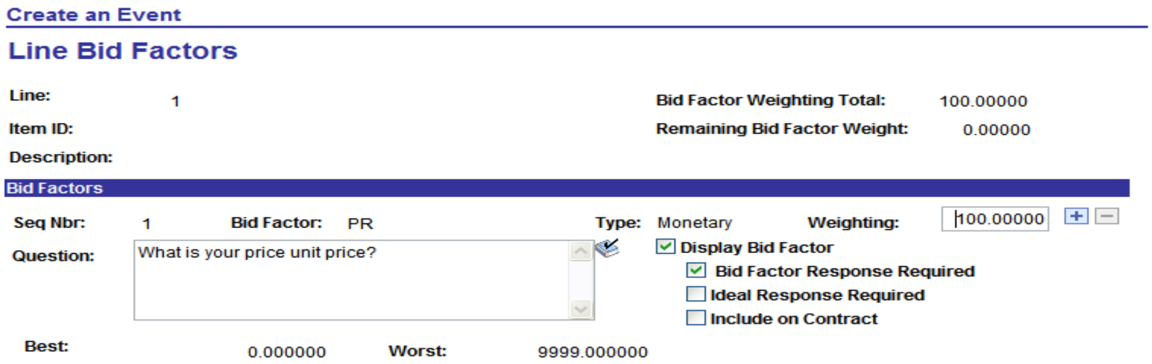
1. To add Bid Factors to a Line, go to the line, click the Advanced Definition tab, and then the Bid Factor link (Bid Factors) located to the right of the Details link. If it is not visible, use the scrollbar to scroll to the right. To view or add Bid Factors you must first have entered a Quantity, Unit of Measure and Start Price for the line, on the Basic Definition tab.



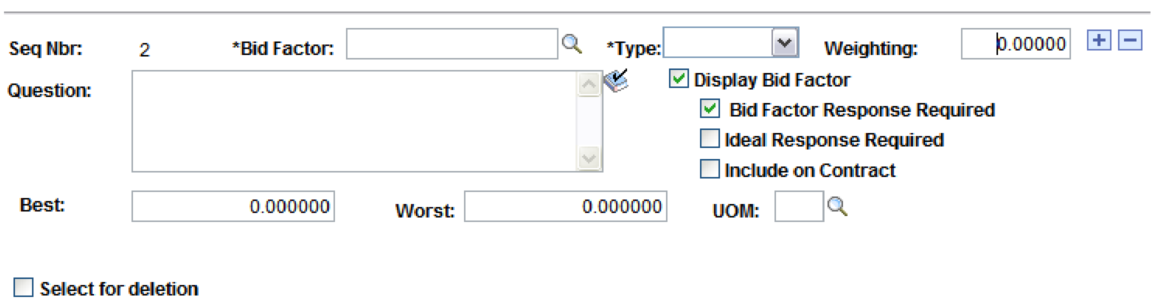
2. After clicking the Bid Factors link, you will be taken to the **Line Bid Factors** screen. **<u>All line-specific Bid Factors must be entered here.</u>**



3. To enter a Line Bid Factor, press the Plus button at the far right ( ). This will add a new Bid Factor immediately after the Bid Factor on which you pressed the Plus Button. The Price Bid Factor will default on every line. Pressing the Plus button on the Bid Factor shown below would create a new Bid Factor after the Price Bid Factor.



4. A new Bid Factor will have no data entered. To choose from the list of existing Bid Factors, click the Lookup Icon ( ) next to the Bid Factor field.



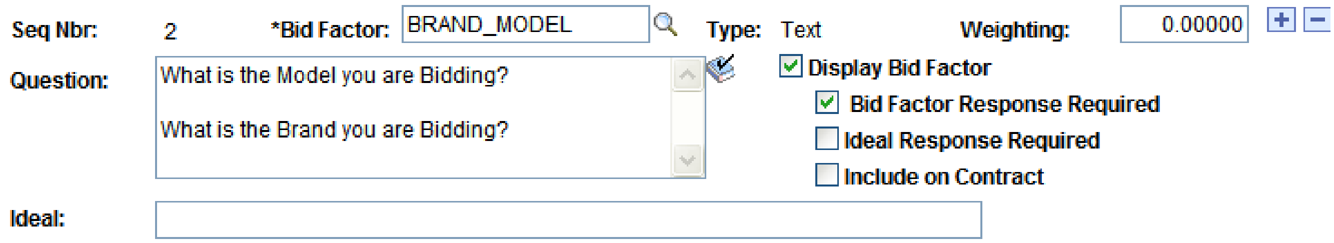
5. This brings up the list of Bid Factors. The search fields work the same as on any other page. Scroll down past the Search fields to see the list of currently-available Bid Factors.

Search Results

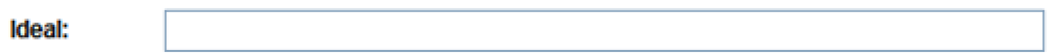
View All First 1-25 of 25 Last

Bid Factor Code	Bid Factor Type	Description
BID_OFFER_EXPIRE	Numeric	Bid Offer Expiration
DGS_ATM_TERM	Text	Service Organization, T505
DGS_BIDDER_COOP	Yes/No	Local Government Offer T500
DGS_INVENTORY	Text	Inventory, T525
DGS_INV_TIME_IN_BU	Text	Inventory, Time in Business,
DGS_LICENSES	Text	Licenses (Listings), T560
DGS_QUAL_CONTROL	Text	Quality Control, T522
DGS_RETURN_GOODS_P	Text	Return Goods Policy, T550
DGS_SEC_STATE	Text	Register with Secretary of Sta
DGS_SRVC_EXPERIEN	Text	Janitorial Service Experience,

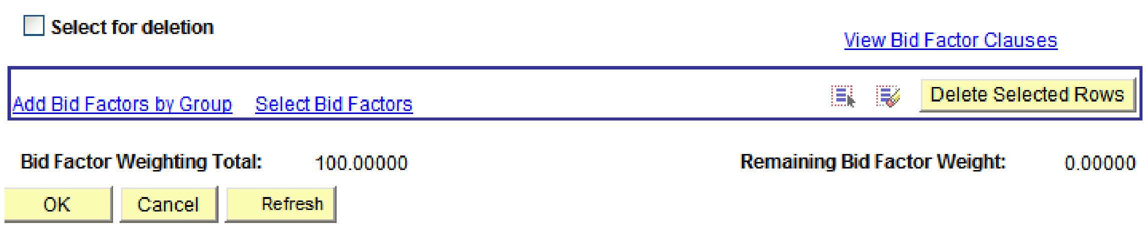
6. Click on the blue link for the Bid Factor needed. This will return you to the Bid Factor screen with the Bid Factor information populated into the field.



Note: If your event deals with a Proprietary brand and model this would be where you would utilize the "**Ideal Response Required**" functionality. Once checked you are required to install the brand and model into the ideal field. If the brand and model bid doesn't match this entry, their bid will not be allowed to be submitted.



7. Repeat this process for every Bid Factor on the line until all the necessary Bid Factors are entered. Then scroll down to the bottom of the page and press the OK button to return to the Line listing.



8. It will be necessary to repeat the above process for each line that requires entry of Line-specific Bid Factors.

9. Once all Bid Factors are entered, click the Save Event Changes button at the bottom of the Line Items section.

After adding all Line Bid Factors:

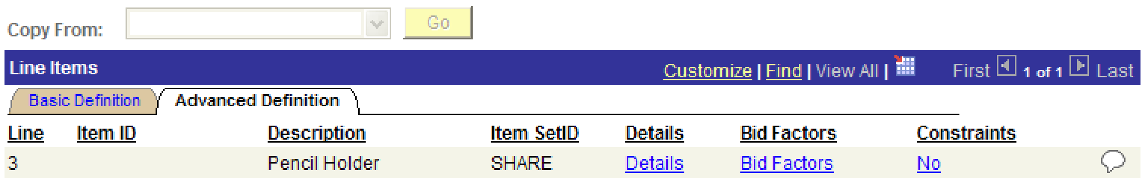
Once all Line Bid Factors are added, you must review them to make sure that **NONE** of them have the "Ideal Response Required" box checked. ☐ **Ideal Response Required** *(Except in proprietary situations)*

IF THIS BOX IS CHECKED, BIDDERS MAY NOT BE ABLE TO COMPLETE THEIR BIDS!

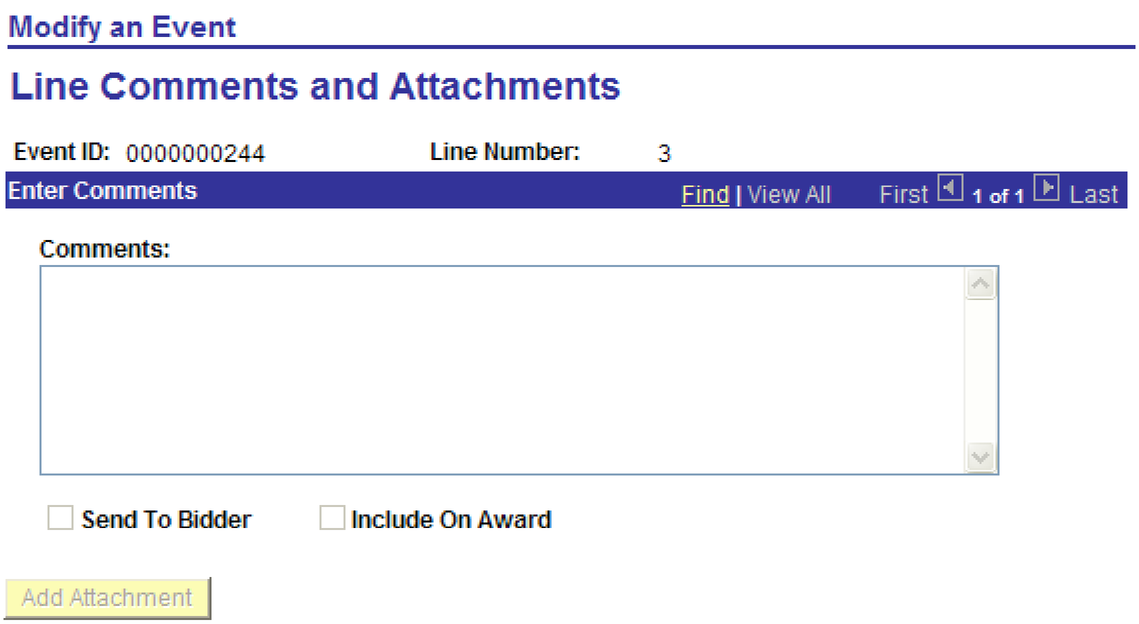
Line Comments and Attachments

In addition to Attachments at the "Header" level, that cover the entire Event, it is also possible to attach files at the individual Line level. If you have line-specific documentation or specifications, this would be where to add them.

1. To add Attachments to a selected line, you must be in the Line Items section. Click the Advanced Definition tab, then the Comments ( ) icon, located on the far right. If it is not visible, use the scrollbar to scroll to the right. A picture is shown below.



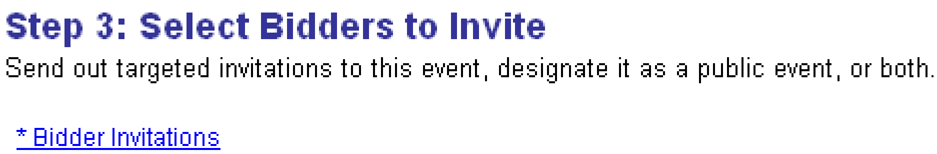
2. Clicking the Comments Icon brings up the Line Comments and Attachments screen. This would be where specifications or comments that apply **<u>only</u>** to the ***selected line*** are attached. Comments can either be typed into the text field or Attached by clicking the Add Attachment button. See the picture below for an example.



3. Once all Lines have either been copied over or manually entered and are confirmed correct, click the Return to Event Overview link.

4. The next step is to select a list of Bidders that will receive the Event Notification.

Inviting Bidders and Vendors:

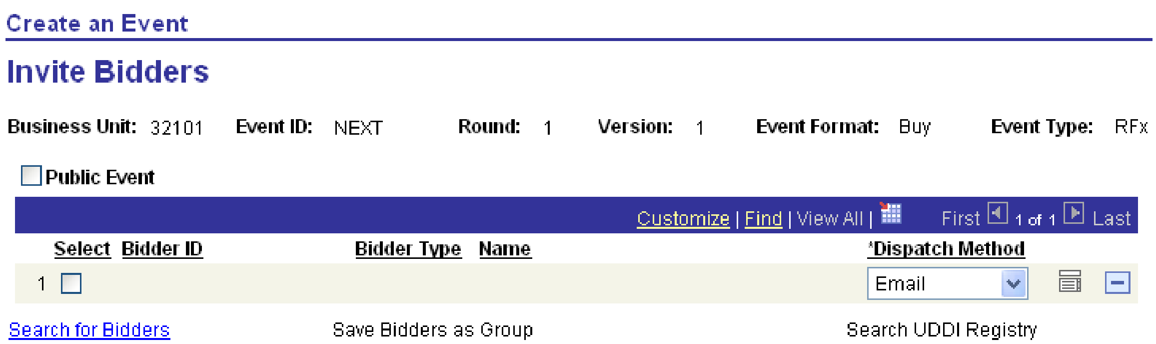


In Step 3: Select Bidders to Invite you will select which Bidders will be sent Event Invitations.

1. Click the Bidder Invitations link.

   * Bidder Invitations

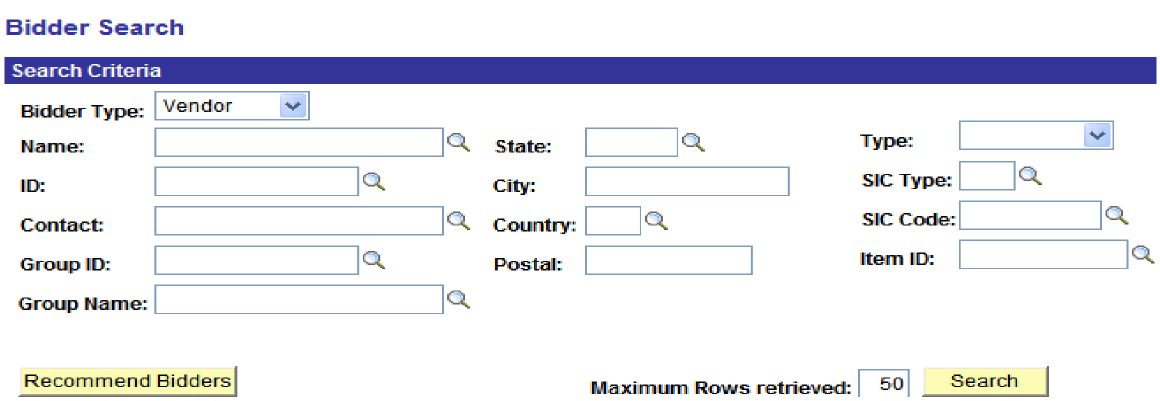
2. This will bring you to the **Invite Bidders** screen, as shown below.



3. To make your event available to the general public on the e-Supplier portal click **Public Event** .

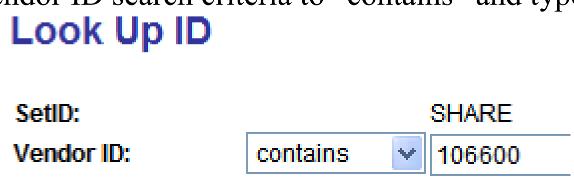
4. Click the Search for Bidders link. Search for Bidders This will bring up the Bidder Search screen.

   - If you already know the Bidders or Vendors you will be contacting, use the Lookup Icon ( ) located by the ID Field or Name Field to pull up a list of Vendors by either ID or Name. This pulls up a list of names.



How to add a vendor/bidder by using their Vendor/bidder #:

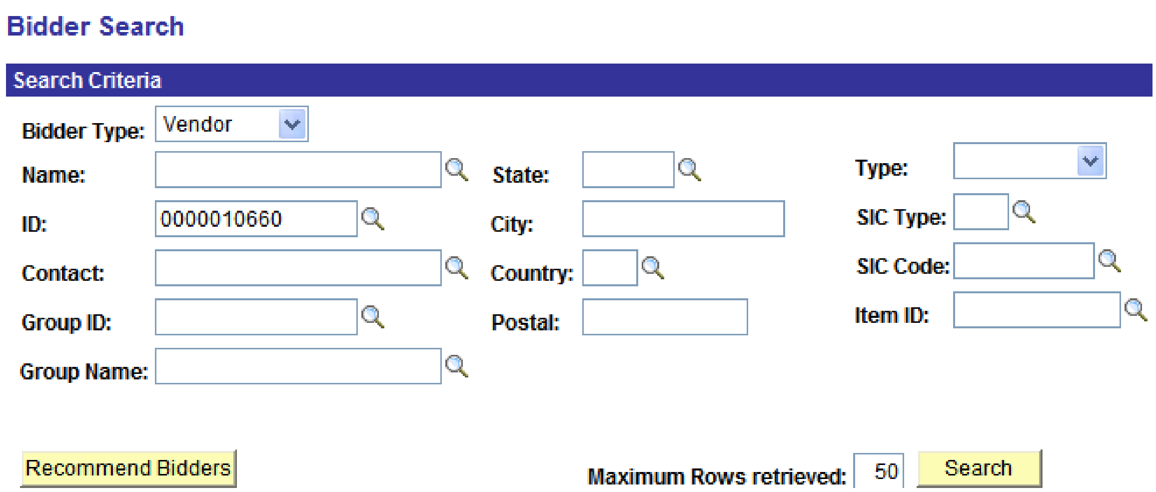
1. From the Bidder Invitations screen click [Search for Bidders]
2. Choose in "bidder type" Vendor or Bidder. You can leave it blank to pull both Bidders and Vendors.
3. Click on the in the ID field.
4. Click on Advanced Lookup. [Look Up] [Cancel] [Advanced Lookup]
5. Change the Vendor ID search criteria to "contains" and type in the vendor number.



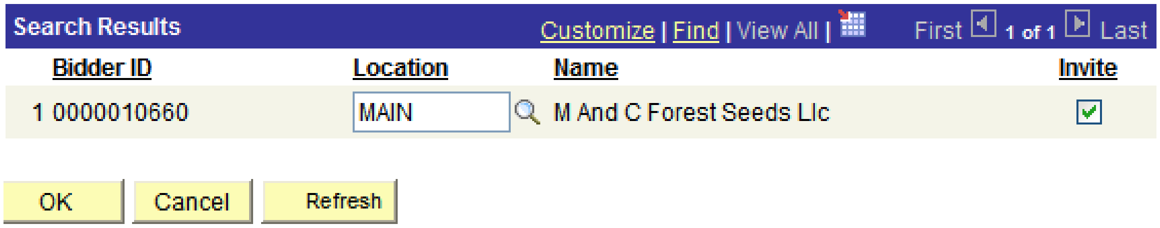
i.

6. Click [Look Up] and your vendor should appear.

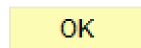
7. Click on the vendor and they will be populated into the ID field.



8. Click [Search] and your vendor should appear again at the bottom of the screen.



9. Check inside the Invite box 

and click 

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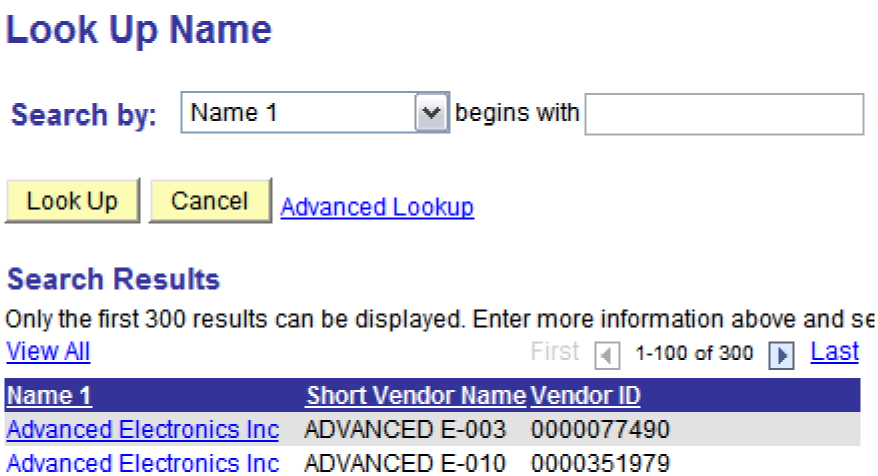
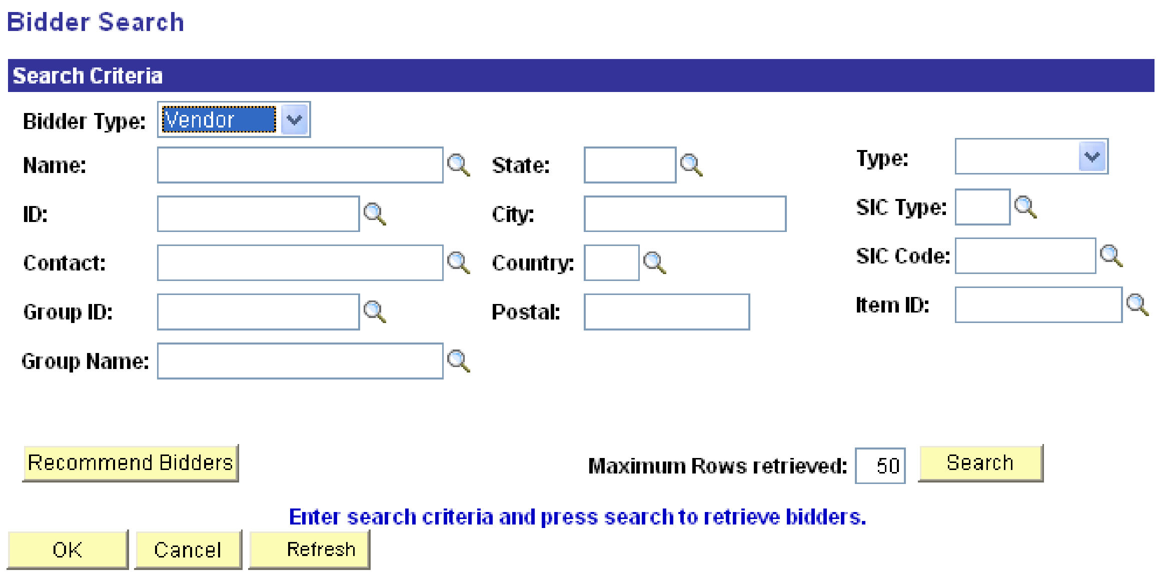
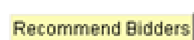
- Your vendor will now be added to the bottom of your bid list.



10. If you do not know the Bidder's ID, you will need to look up Bidders from the listing based on NIGP code. The Bidder Type drop-down menu at the upper left will be used in selecting bidders, along with the Recommend Bidder button. This pulls a list of all registered Bidders and Vendors that have the NIGP codes of the items included on the Event lines. Steps start below the picture.

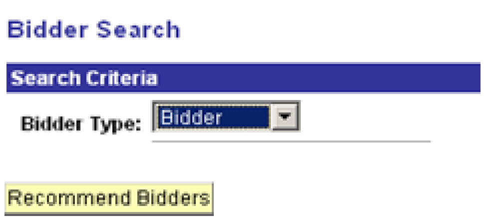


11. Select Vendor from the Bidder Type drop-down menu.

12. Press the Recommend Bidders button. 

This will bring up a list of all the Vendors that are registered in the system for the NIGP codes listed on the Event Lines.

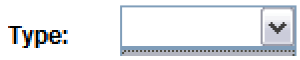
13. Select Bidders from the Bidder Type drop-down menu, and then click the Recommend Bidders button a second time.



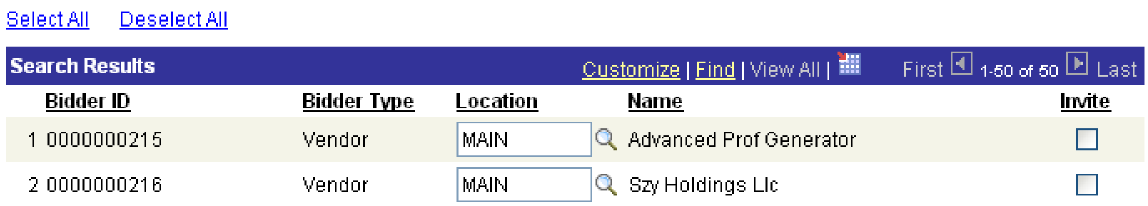
14. These two steps (5 and 6) compile a list of all Vendors and Bidders. Vendors are companies or entities that have received an award or payment from the state. Bidders are companies or entities that have registered but have not received an award.

15. If you need to narrow your search to only registered diversity vendors that are associated to the NIGP codes used in the event navigate to the "Type" field and select "Minority" from the list. **Additionally, be sure to consult the list of Certified Diversity Vendors at:** http://www.tennessee.gov/businessopp/regdivcomp.html

16. This field can also be used to search for bidders who are registered for a specific regional area. To do so, go to the Type field and select “East”, “East/Mid T”, “Middle”, “West” or “Statewide”. Then press the Recommend Bidders button again.

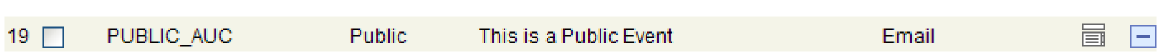


17. Select the desired Bidders and Vendors from the compiled list by checking the Invite box next to the name.

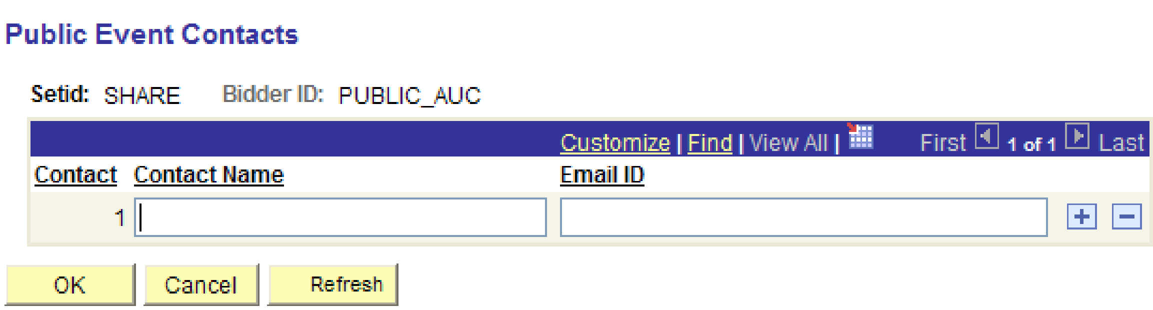


18. After all desired Vendors and Bidders are selected, click the OK Button. This will pull the selected Bidders and Vendors into the **Invite Bidders** screen, as shown below.

Utilizing Public Auction to add email addresses to bid list



By clicking on the contact details tab under Public_Auc you can manually add email addresses to an event’s bid list.



- Click the  button to add contacts.
- Click OK and then Save Event Changes.

After all vendors and bidders are selected, click the Return to Event Overview link.
< Return to Event Overview

❖ The Preview Date and Time, Start Date and Time and the End Date and Time need to be set up now.

  - The Preview Date and Time sets the Event up so it can be viewed but not Bid on, for the time between the Preview Date and Time and the Start Date and Time. In the picture below, there is a week between the Preview Date and the Start Date, and two weeks between the Start and End Dates. **Generally, make the Preview Date and Start Date the same.**

Preview Date:	11/30/2010 9:00AM CST
***Start Date:**	11/30/2010 9:00AM CST
***End Date:**	12/13/2010 1:00PM CST

Posting the Event

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event Post Save As Template Preview PDF

- Review the event one final time for correctness, paying special attention to the Event Lines and the Bidder Invitations. When the final review is complete, press the Post button to route the event for approvals.

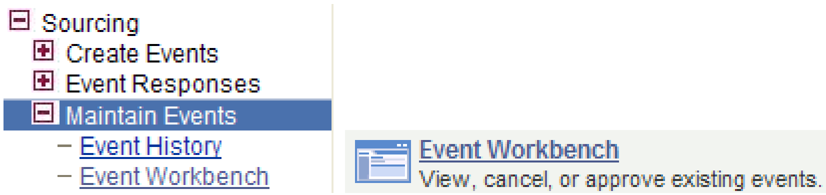
Altering and Changing Events

Once the event is posted creating a new event version will not allow you to change bid factors or add/subtract lines. It *will allow* for the dates to be changed and allows for adding attachments.

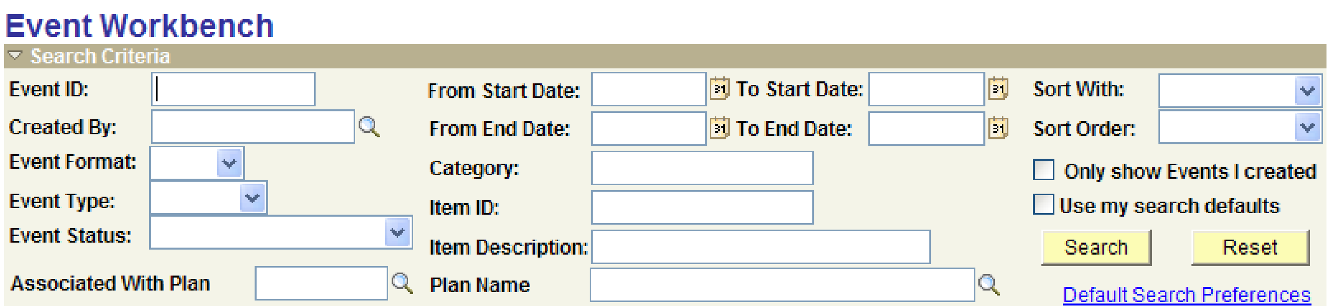
- When you create a new version from a posted event on the portal, the event will remain on the portal until the "new" version is posted. Therefore if a buyer feels that an Event should be removed from the Portal, the only avenue is to cancel the event **or change the end date on the event to the current date and time. This action will "complete" the event and remove it from the portal.**

Creating New Versions and Canceling Events

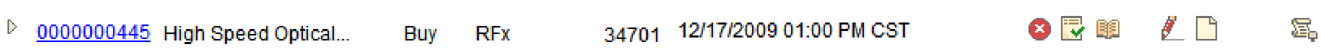
1. Go to the Event Workbench, under **Maintain Events**.



2. Type your Event ID at the top and click the Search button on the right-hand side.



3. After your Event is pulled up, scroll to the right and look at the Icons on the right-hand side.



- **Creating a New Version:** To create a New Version of the Event, click the **Create New Version** icon .

    - Creating a New version of the Event:
        - Will allow you to change Attachments
        - Will allow you to change Dates
        - Will allow you to change the Event Description
        - **Does** send a new notification to all the Bidders that a new Version has been created

        - Will **not** allow you to change Bid Factors
        - Will **not** allow you to change the Event Name
        - Will **not** immediately pull the Event from the Portal (website)

- **Canceling an Event:** To Cancel an Event, click the **Cancel Event** Icon ( ).

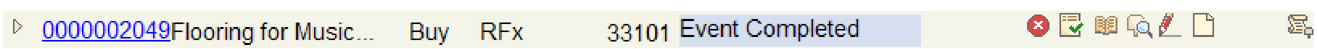
    - Canceling an Event:
        - Completely disallows any and all changes, including the addition of Notes or Comments.
        - You should Copy your Event to a new Event *before* Canceling.

- **DO NOT** cancel an Event until you are absolutely sure you will not need it again.
- **DO NOT** cancel an Event if you know that Edison staff is working on your event to correct some problem.

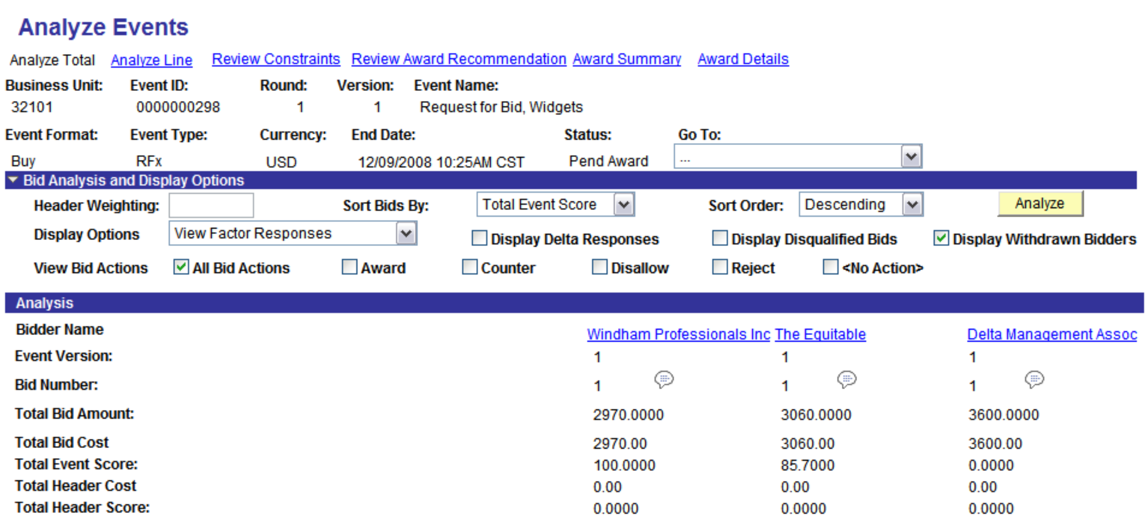
Evaluating and Awarding Sourcing Events to selected Bidders

Events end when their End Date and Time are passed. Once the Event has ended, the bids are evaluated to determine the lowest responsive and responsible bidder.

Analyzing Bids: Analyze Events is available from the workbench. Click on to pull up the Analyze E vents screen.



1. Clicking will take you to the main Analyze Events page, shown below. The analyze Events page starts out on the Analyze Total tab, which allows you to view up to three Bids on one screen. At the start, only the first two bids will be visible. By scrolling to the right using the scrollbar at the bottom of the screen, you can see more of the Bids. The picture below shows three Bids.



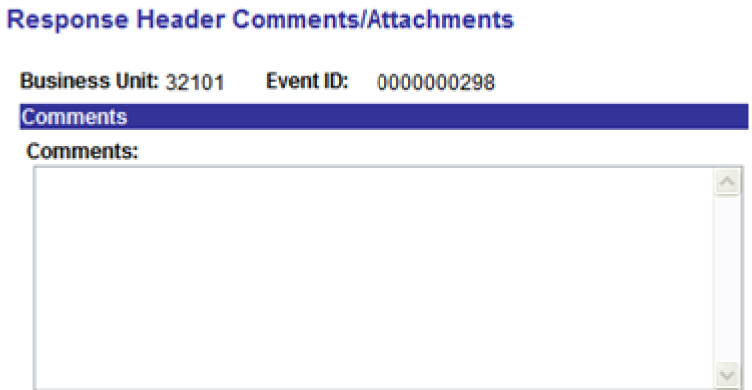
2. The Analyze Total page lists information about the bid as a whole.

Bid Analysis: Reviewing a Bid and determining a Bidder consists of several steps, including analysis of the **Total Bid Amount**, any **Header Comments**, any **Line Comments** and any attached documents in the Bids that elaborate on any comments.

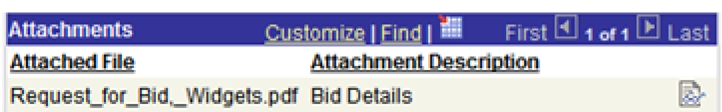
- **Total Bid Amount:** You can view the total price Bid by a vendor by looking at the **Analysis** section on the **Analyze Total** page. The **Total Bid Amount** row shows the combined price the Vendor has bid on all the lines.

- **Header Comments**: To view comments from a bidder on the Analyze Total page, scroll down to the **Analysis** section, which lists the Bidders and the total price they are bidding. Click on the Header Comments icon ( ) in the column for each Bidder.

  - Clicking on the Header Comments Icon takes you to the Response Header Comments/Attachments section, where you can view any comments posted by the Vendor with their Bid.

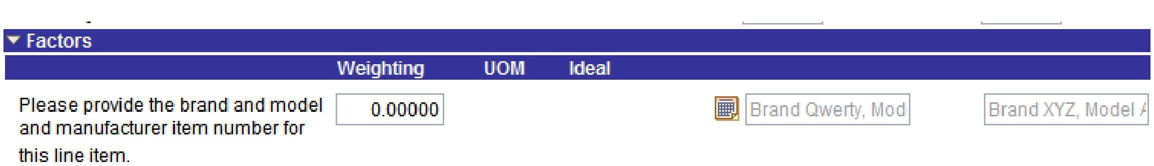


- A PDF version of the Bid with comments can be found in the Attached File section at the bottom of the page, viewable by clicking on the View Attached File ( ) icon.



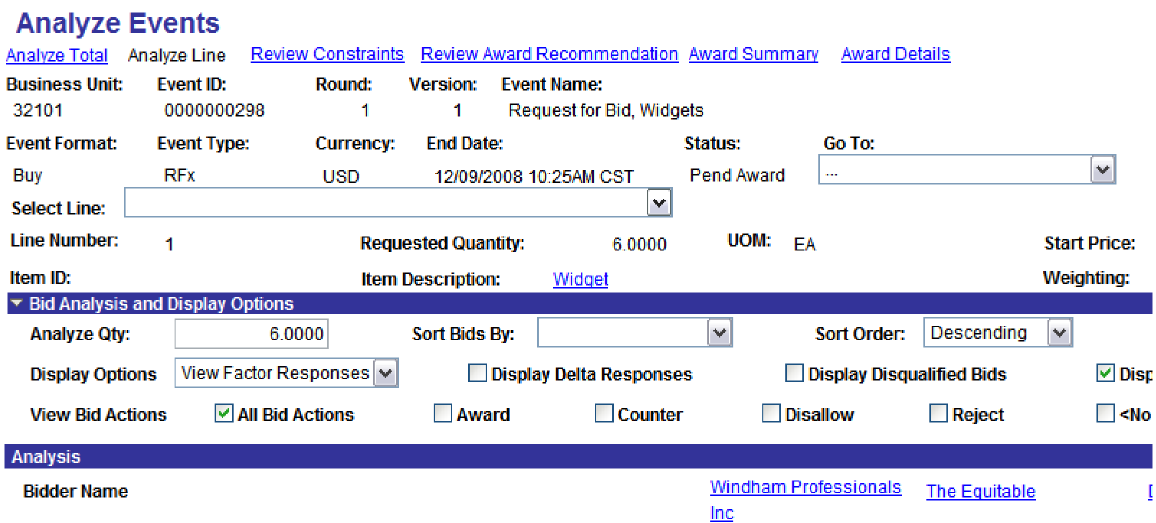
- After reviewing the Comments and any attached files for the first Bidder, repeat the process for all other Bidders. To do so, press the Return (Return) button at the bottom of the **Response Header Comments/Attachments** page to return to the Analyze Total page, then select the Header Comments icon ( ) for the next vendor.

- Once the Comments and attached files for all Bidders are reviewed, return to the main Analyze Total page again. Scroll down to the Factors section and review the answers given. To view all answers, you may need to use the scrollbar at the bottom of the page to scroll to the right. The picture below shows one Bid Factor for two of the three Bidders.

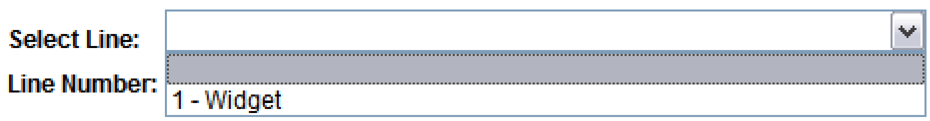


- When all of the Header Comments and Header Bid Factors have been reviewed, move on to reviewing the Line Comments and Line Bid Factors.

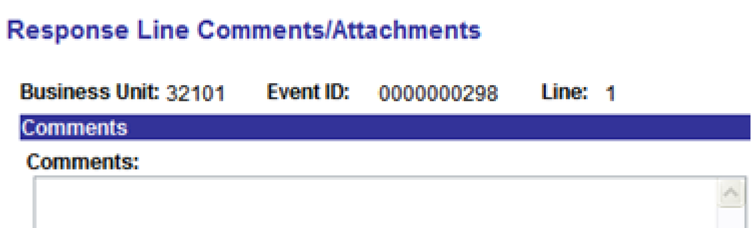
- **Line Comments:** To view Line Comments for specific lines, first click the **Analyze Line** link at the top of the main **Analyze Events** page. The picture below shows what the main Analyze Events page will look like with the Analyze Line link clicked.



- Use the Select Line drop-down box to select the line for review. All Bid Lines must be reviewed, but in the example Bid there is only one line.



- After selecting the appropriate Line for review, you must view the Line Comments for each Bidder. This is done the same way as viewing Header Comments, in that you must click the ( ) icon, which on the Analyze Line section means **Line Comments.** Clicking that link will take you to the page below, where any comments submitted for the line by the Bidder will be shown.



Award Summary Page

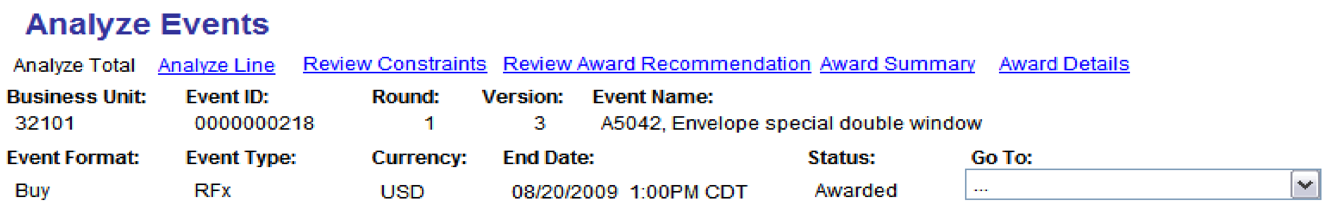
There have been smoe instances where an Event Line becomes unavailable to award after the drop-down box is changed from "O" to "C".

Due to this possibility, **DO NOT change the "Line Status" drop-down box from O to C.**

Posting Bid Tabulations to the e-Supplier Portal

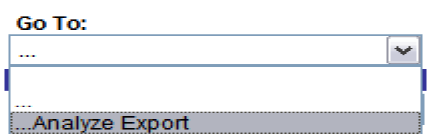
- Generating the Analyze Export will post the event's tabulation to the e-Supplier Portal so the participants in your event can easily see what their competitors bid. This is also the easiest tool to utilize in looking at your bid results. After changing the format, (described below), the export will be an Excel spreadsheet. This spreadsheet allows for great manipulation in terms of evaluating bids posted.

1. Go to the **Analyze Events** page in Edison, for the Event you want to look at.

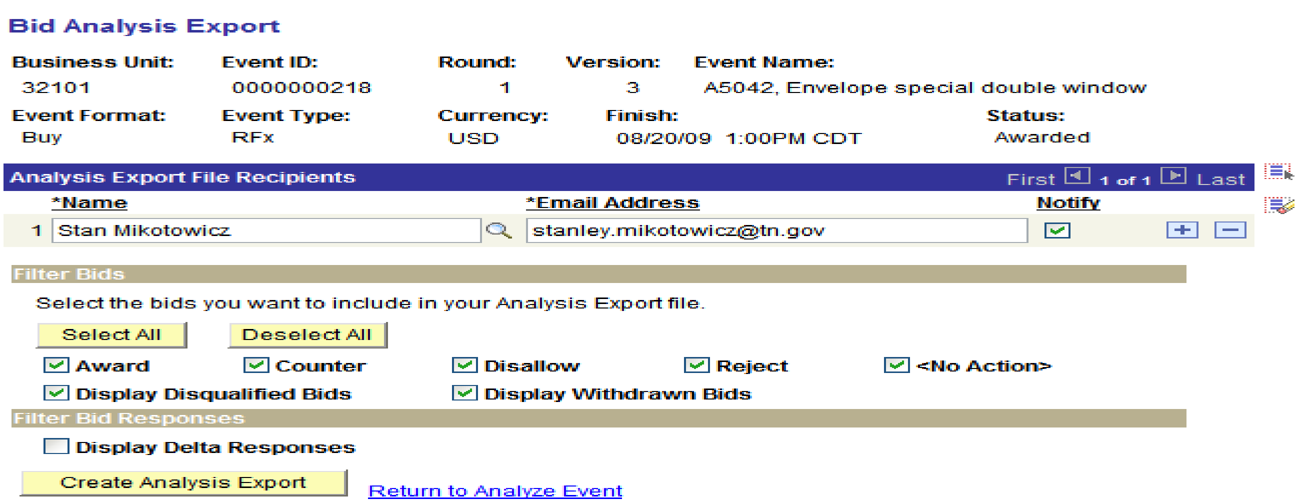


2. Click on the **Go To:** drop-down box at the upper right of the **Analyze Total** tab.

3. Click on the **Analyze Export** option.

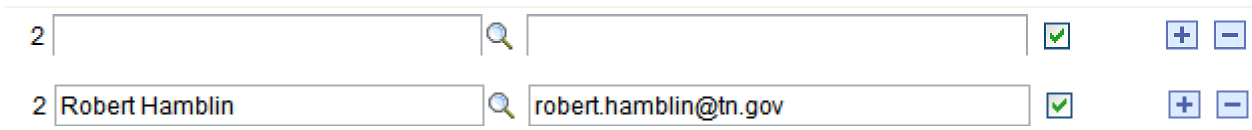


4. This takes you to the **Bid Analysis Export** page.

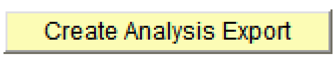


5. In the **Analysis Export File Recipients** section, you can add other people to receive a copy of the export.

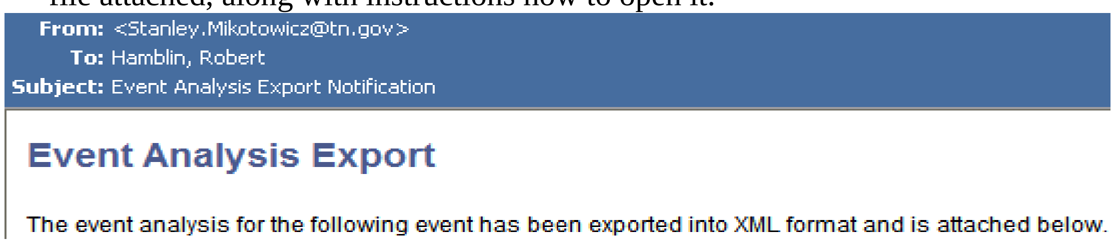
Press the Plus (+) button to add another blank recipient line, then fill in their name and e-mail address.



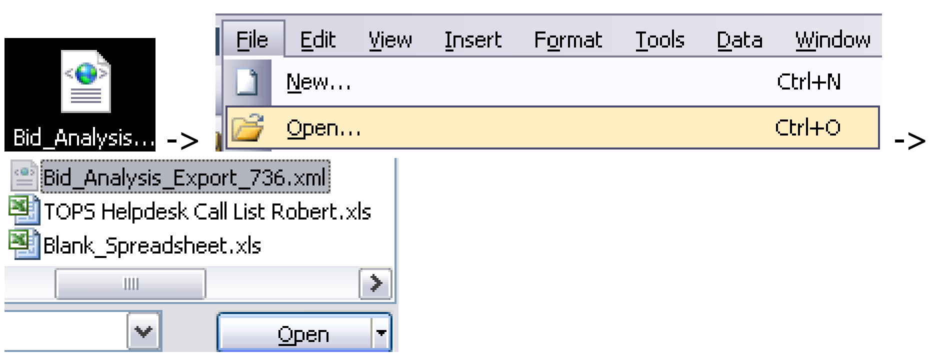
6. After all the Recipients you want have been added, click on the **Create Analysis Export** button at the bottom of the page.



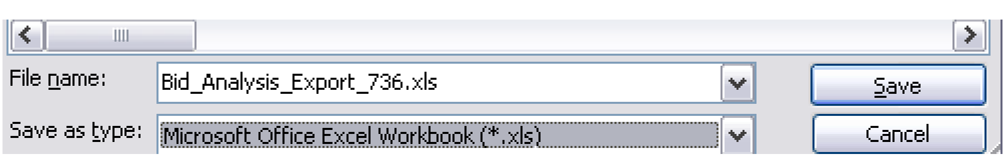
7. A few minutes later, all the recipients you listed will receive an e-mail that has the .xml Export file attached, along with instructions how to open it.



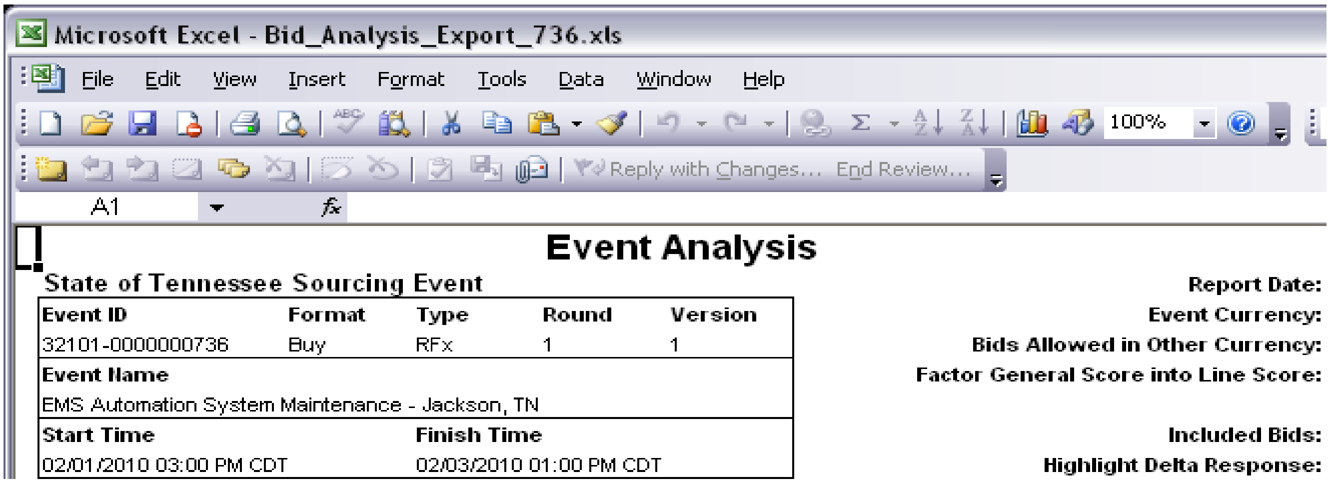
8. Save the file to your desktop or folder. Open Excel, then go to File-> Open and select the XML file from wherever you saved it.



9. The file will open. Then immediately go to **File**, then **Save As** and save a copy of it in .xls (Excel) format.



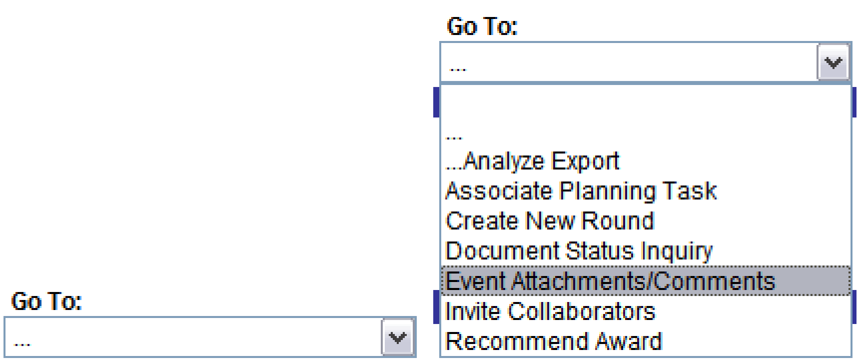
10. Close the XML file and open the Excel file. It should look like the picture below.



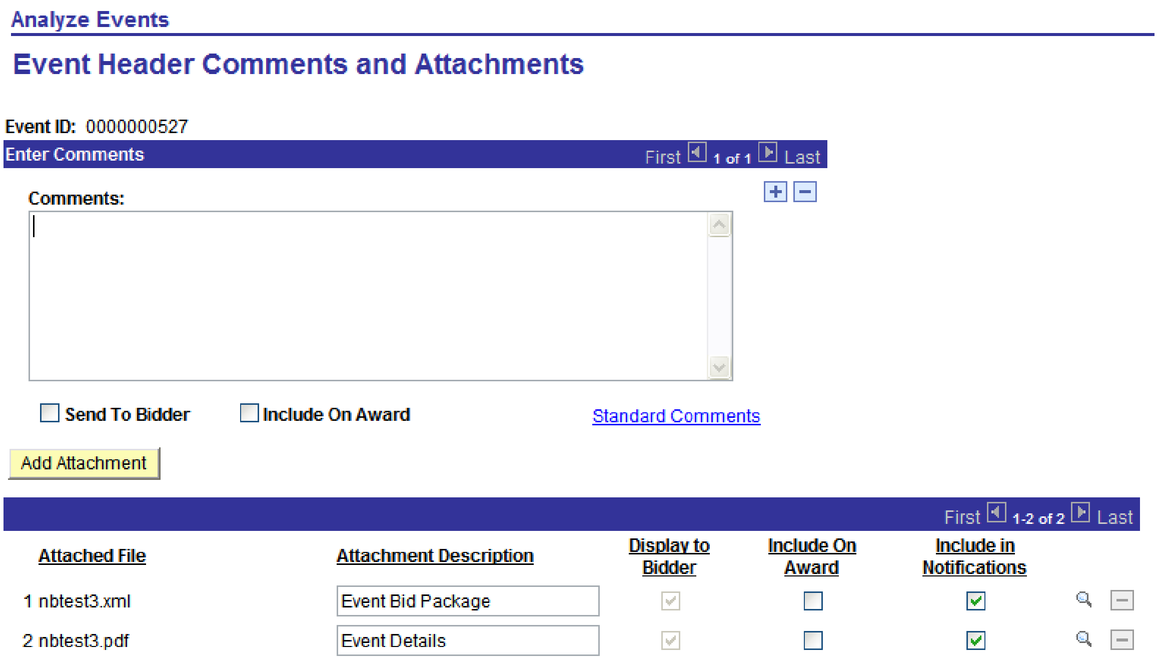
- The tabulation will now to available for viewing on the e-Supplier Portal home page under “Bid Evaluations”. They will have to perform the instructions about converting the xml file to a spreadsheet.

Awarding to Vendor

- After determining the winning Bidder, return to the main Analyze Events page. Click the Go-To Drop-down box at the top right of the page, and select the Event Attachments and Comments option.



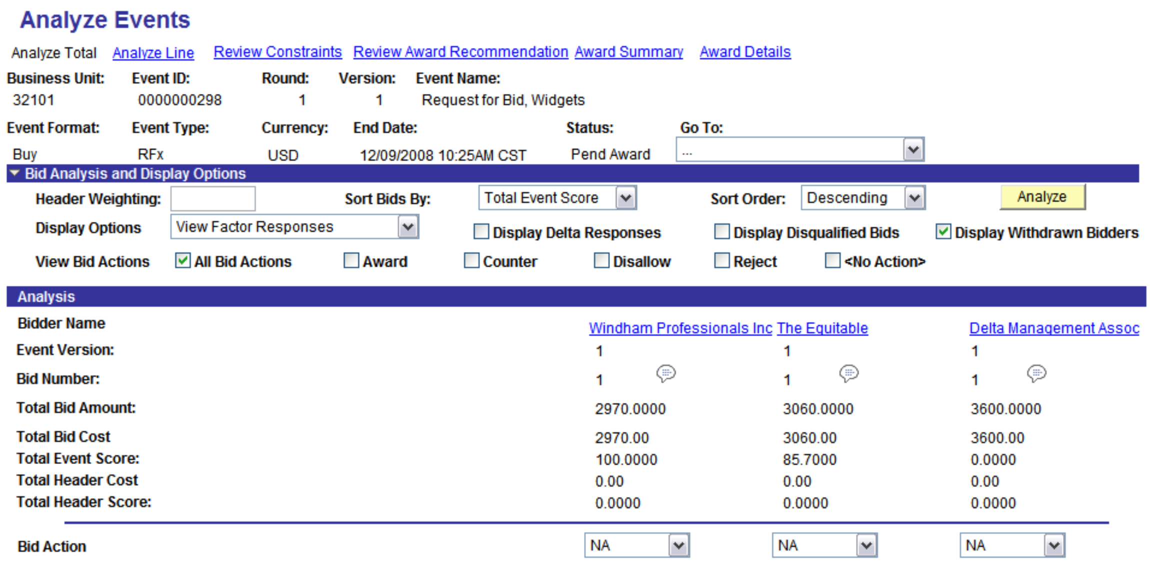
- This takes you to the **Event Attachments and Comments** page, where you will enter your notes and justification for awarding to the selected Vendor. Type your notes describing the justification for awarding to the selected vendor in the Comments text box. For internal comments such as notes, do not check the Send to Bidder or Include on Award boxes. Then press the OK button at the bottom of the screen to return to the main menu.



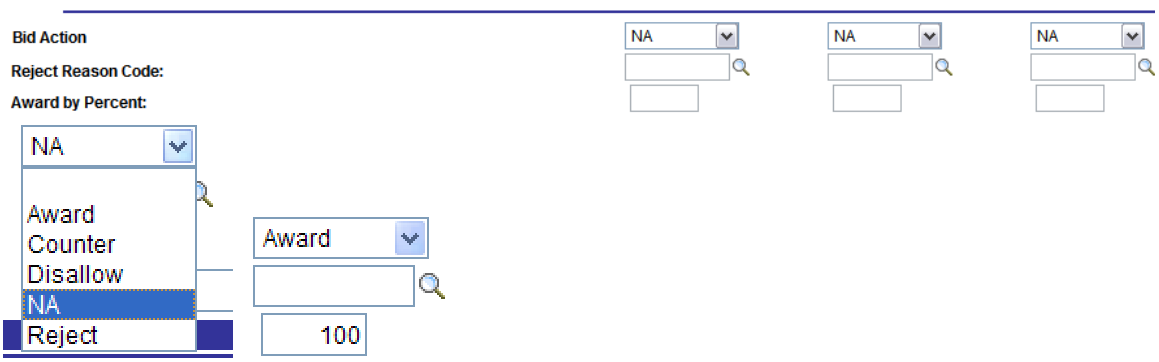
From here, the award method differs depending on whether you are awarding to a Purchase Order or to a Contract.

Awarding all lines to one vendor

To Award an event, go back to the main Analyze Total page, shown below.



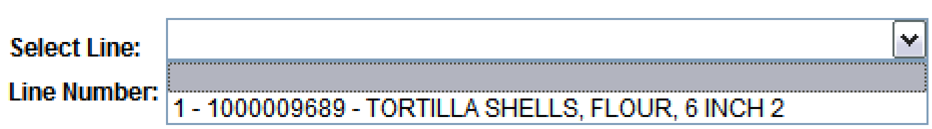
- Select Award from the Bid Action drop-down menu, located under each bidder's header.
- Enter 100 in the Award by Percent field, under the column of the winning Bidder.

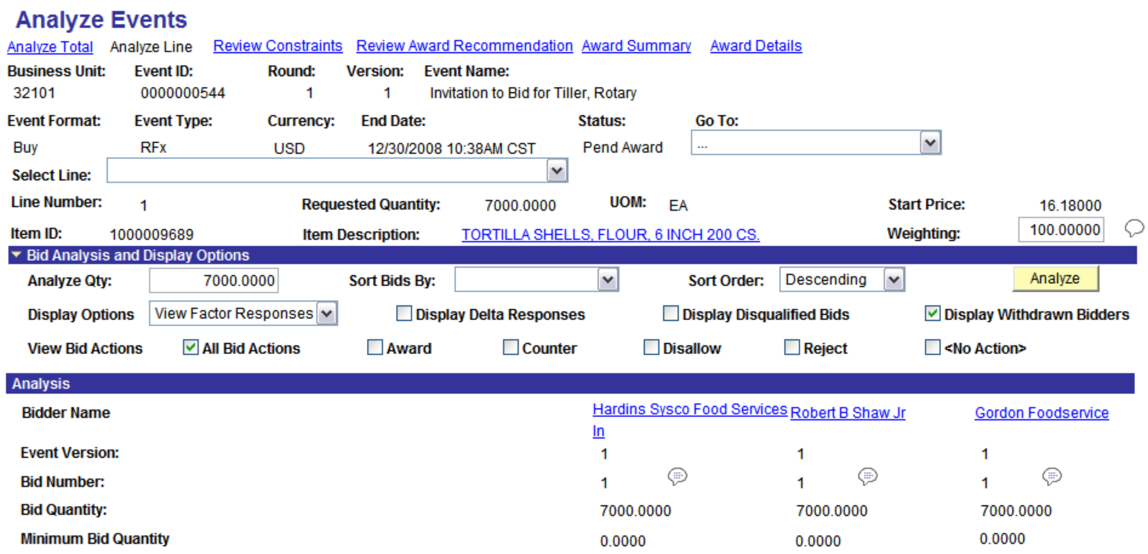


Line Item Awards

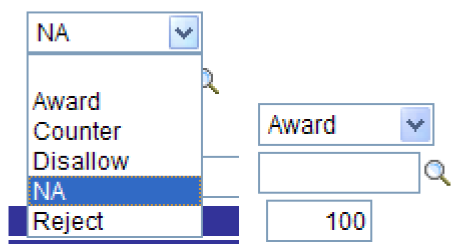
To award to different Vendors by Line Item, go to the **Analyze Line** page, shown below. By default, it will start on the first line. Use the Award drop-down box to select the vendor to award the line to, similar to the above award process for all lines to one Vendor. . Use the "Select Line" dropdown box to select a different line of the Contract. Repeat for each line as necessary.

- Eliminate all distractions when awarding to multiple vendors with multiple lines. It is very easy to get confused and award to the wrong vendor or wrong bid number.





- For each line enter 100 in the Award by Percent field, under the column of the winning Bidder. This means you're awarding 100% of that line to the awarded vendor.



- When awarding by line, to multiple vendors, it can get confusing as to who you've awarded to. One way to get an accurate glimpse of what lines you've award and who to is to go to the Award Summary section. This page will display each line and the awarded vendor/bidder.

Line Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status
1 1000129499	Emergency Generator Maintenance, Major Semi-Annual Inspection, Lowell Thomas State Office Bldg., 225 Dr. Martin Luther King Dr., Jackson.	3.0000	1150.000000	3450.0000	0.0000	0.0000	3.0000	C

Select	Name	Awarded Qty	Total Line Amount	Extended Amount
☐	Carter And Co	0.0000	415.00000	0.0000

Line Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status
2 1000129500	Emergency Generator Maintenance, Minor Semi-Annual Inspection, Lowell Thomas State Office Bldg., 225 Dr. Martin Luther King Dr., Jackson.	3.0000	590.000000	1770.0000	0.0000	0.0000	3.0000	C

Select	Name	Awarded Qty	Total Line Amount	Extended Amount
☐	Carter And Co	0.0000	220.00000	0.0000

Note: When you are on the Award Details page and attempting to Award to different Vendors for each line, the display may be somewhat confusing.

When you award by line the system displays every line bid on the award details page for every award. For any line that has $0.00 the system is recognizing that another bidder received the award. Once you click the "post" button the purchase order or contract is created and only the awarded lines (with actual bid prices on the award details page) will be carried over.

This means that if a line is listed under a certain vendor with an award Price of $0.00, it will not actually be awarded to that vendor, even though it is displayed.

Award Details First 1 of 6

Bidder Name: Louisiana Forest Seed Co , Inc **Bidder Type:** Vendor **Buyer:** mattc0620001

Award Type: PO Contract Award Currency: Event USD Terms:

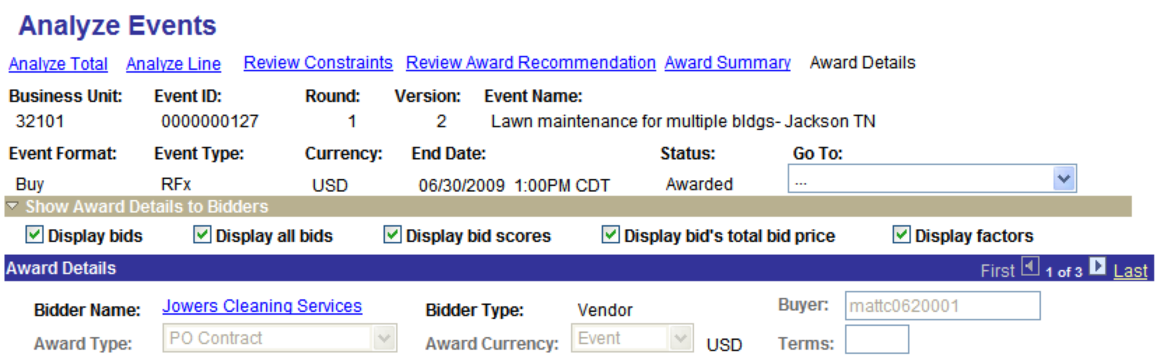
Contract ID 0000000000000000000018029 PO Business Unit: 32501

Award Number: 1 **Total Award:** 883.7000

Award Lines

Line	Item ID	Vndr/Item Rel	Seed, American Beautyberry (Callicarpa americana) Location: East Tennessee Nursery, P.O. Box 59, 906	UOM	Award Quantity	Awarded Price	Extended Price
32	1000113024	☑	Seed - Pine, Loblolly, 2nd Generation	LB	100.0000	26.0000	2600.0000
2	1000112377	☑	Seed, Hazelnut (Corylus americana) Location: East Tennessee Nursery, P.O. Box 59, 9063 Hwy. 411 Sout	EA	0.0000	0.0000	0.0000

For example, in the above picture, Louisiana Forest Seed CO, Inc will not actually receive an award for line 2, Hazelnut Seed, even though the line is listed, because it is being awarded a quantity and price of 0.

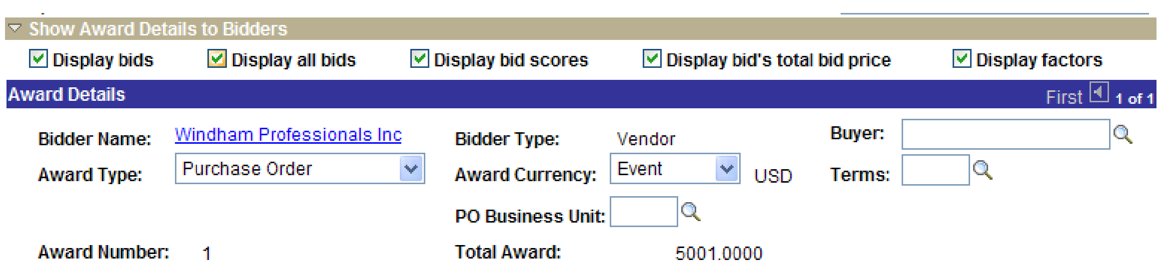


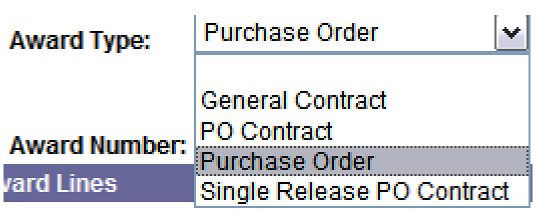
- Review the vendors you awarded to by clicking on the **Award Details** page. Navigate through each award by clicking .

Awarding to Purchase Orders:

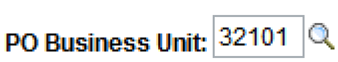
To be done after you've set all lines to "Award".

1. Click the Award Details link at the top of the page. Select Award Type from the drop-down menu. To award to a PO, select Purchase Order from the drop-down.

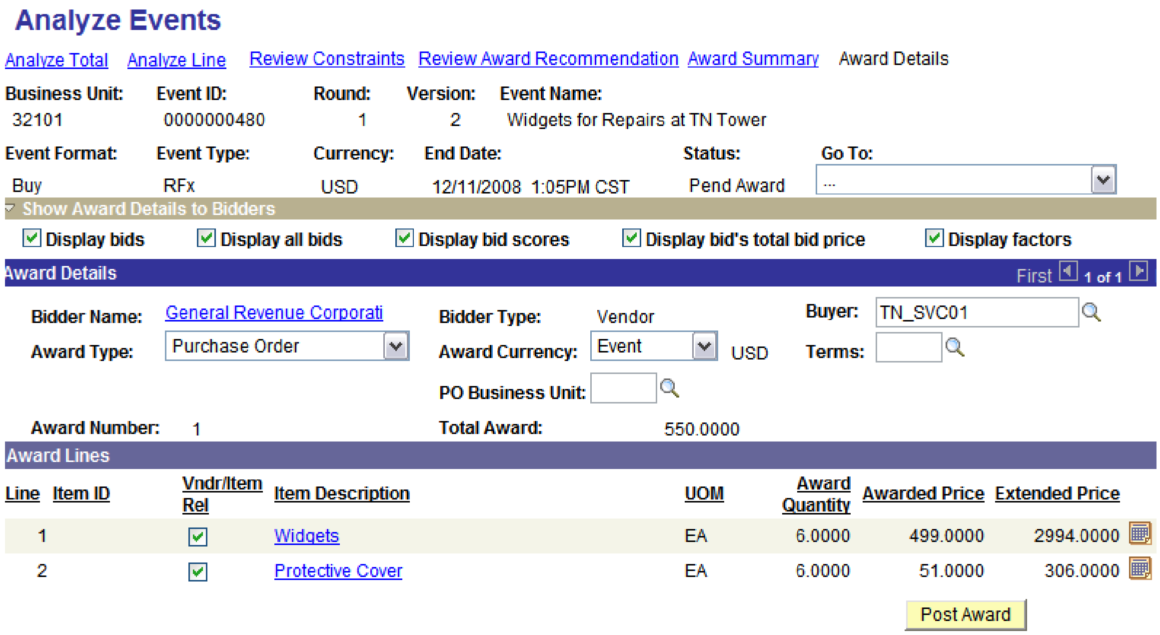




2. Once an Award Type has been selected from the Award Type drop-down, type in the Business Unit the PO is for, if it did not default in. This field is shown below.



3. You must now finish awarding the Event. To do so, hold down the **Ctrl key** (Ctrl) on your keyboard and click the Post Award button, located on the Award Details screen.



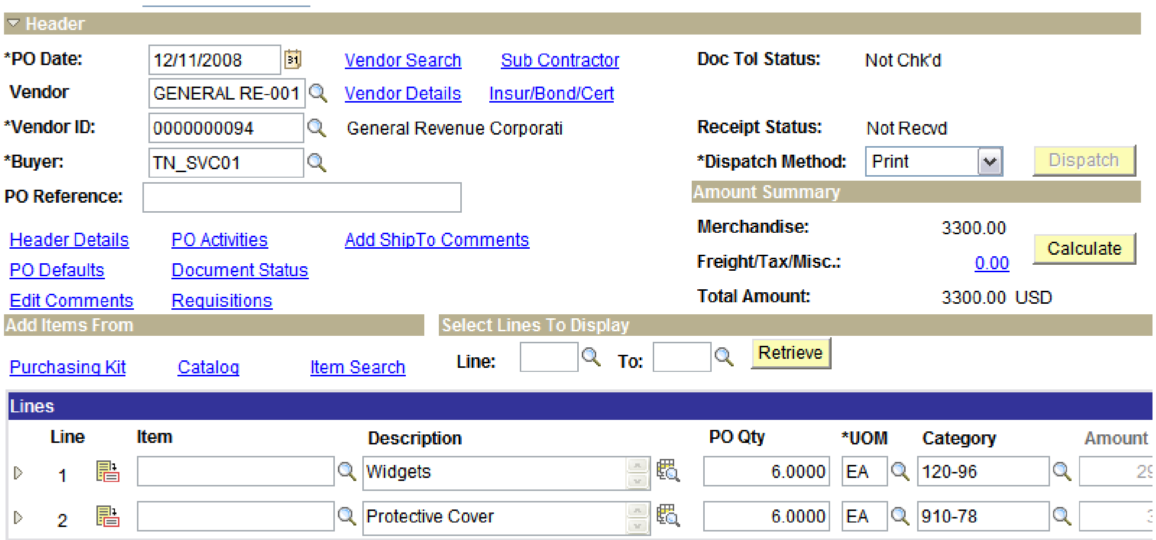
4. You should be taken to the Purchase Order screen.

Creating Purchase Orders

Purchase Orders are created by after a Requisition has been processed.

You will be automatically taken to the Add/Update POs page after clicking the Post Award button, if the Award Type selected was "Purchase Order".

1. The PO Date, Vendor Name, Vendor ID, Buyer ID and the Lines should default in from the Event and the User Preferences. These can be changed from the **Vendor Details** link (Vendor Details) if they did not transfer over correctly. The picture below shows an example of what the screen will look like with these values defaulted in. The next few sections are for **review**, and *options may not need to be changed.*

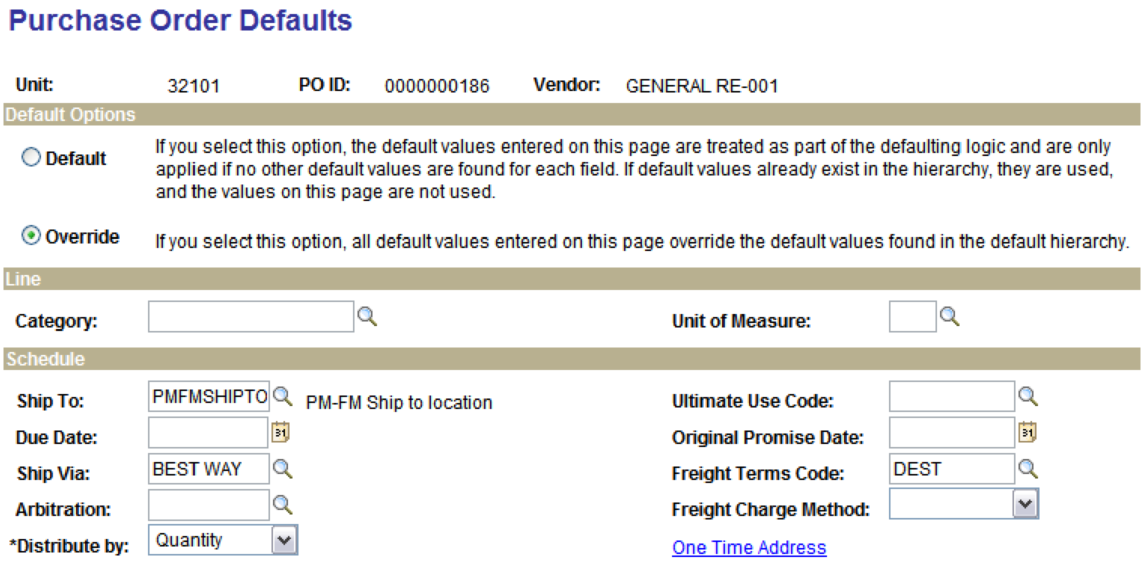


2. **Review Header Details:** If all of the information listed in step 1 is correct, go on to review the Header Details by clicking the Header Details link. This takes you to the **Header Details** screen shown below, where you can review Billing Information, Vendor Information and Tax-Exempt status, and accounting date for the PO. This also allows you to set if Acknowledgements of the Purchase Order are required.

3. **Review PO Defaults**: The things that can be changed on this screen are the **Schedules,** the Distribution and information. This is used to determine where the items on the lines will be shipped, if portions of the order need to go to different locations. The two Radio Buttons at the top, Default and Override, determine what will happen with the information entered on this screen.

   - Default: These become a new default only if there were no default values set up for that field. For example, entering a new Ship-To address when one already exists will do nothing if Default is selected.

   - Override: These override any existing information. For example, entering a new Ship-To address when one already exists will overwrite the old one, if Override is selected.



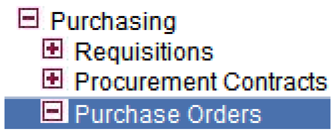
4. After reviewing all the information on the PO, return to the main **Purchase Order** page and click the Save button, located at the bottom of the screen.

5. You will now need to Budget Check the document and Dispatch it. To Budget Check, click the **Budget Check (** **)** icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status**: **Valid**. This encumbers funds for the Purchase Order. An example is shown below. The PO must be approved after Budget Check before it can go any further.

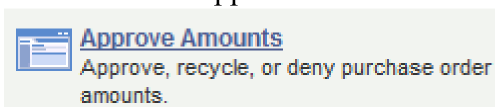
If budget status is error: This can occur when funds are lower on the requisition than the awarded purchase order the system allows the purchase order to build but when the buyer budget checks the PO they will see a Doc Tolerance error or a budget error.

The buyer must contact their fiscal officer or someone that has the approval rights to override a doc tolerance or budget error. After they complete that step the PO can be processed.

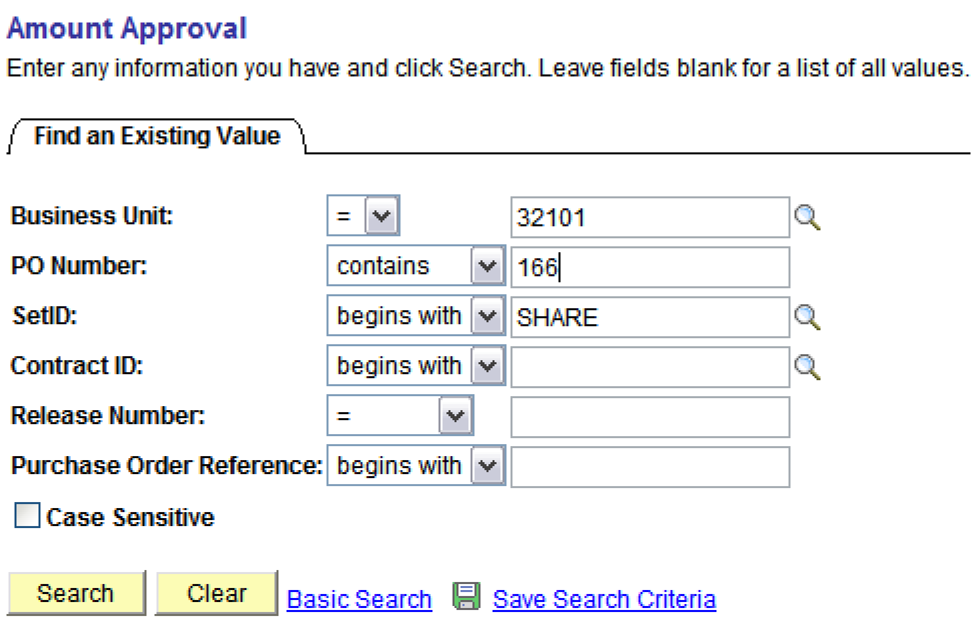
6. The next step is to approve the PO. To do so, click the “Purchasing” link on the left-hand menu. Then click “Purchase Orders”.



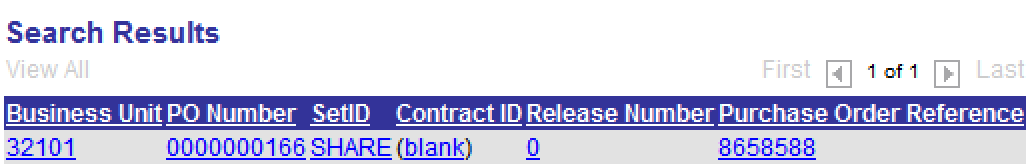
7. Click the "Approve Amounts" link under the Purchase Order section.



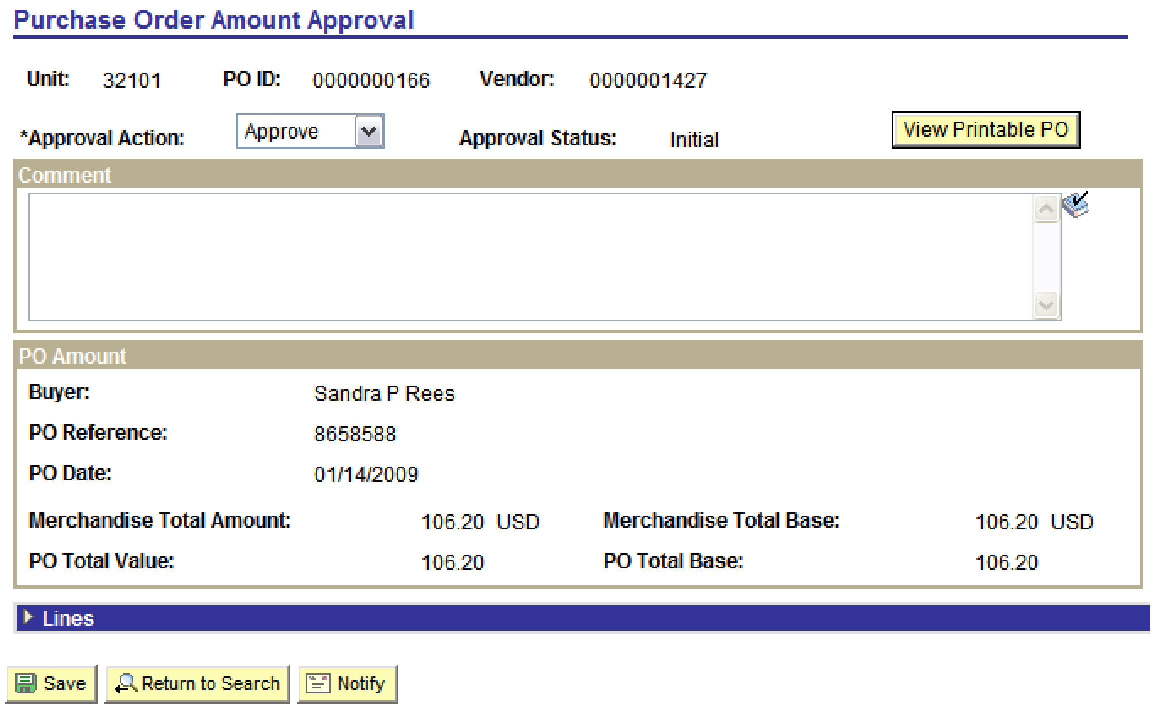
8. Use the Search screen that appears to find your Purchase Order by typing the PO number into the "PO Number" field and changing the drop-down box from Begins to Contains, as shown below. Then press Search.



9. Click the link for the PO that appears.

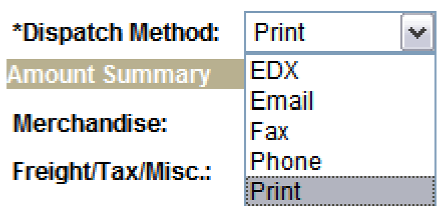


10. This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to "Approve", then press the Save button. It defaults at Approve.



11. Return to the main Purchase Order screen.

12. After being Budget Checked and approved the Purchase Order is ready for Dispatch. Check the **Dispatch** drop-down menu on the main page to make sure the preferred Dispatch Method is selected. **<u>Change the method to "Print".</u>**

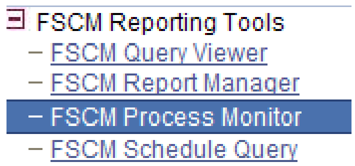


13. Once all the information is reviewed and the PO has been Budget Checked, the **Dispatch** button will be highlighted. Click the Dispatch button (Dispatch) to finish the Purchase Order process and generate the print job in your Process Monitor.

<u>Printing a authorized PO</u>

You must have dispatched the Po.

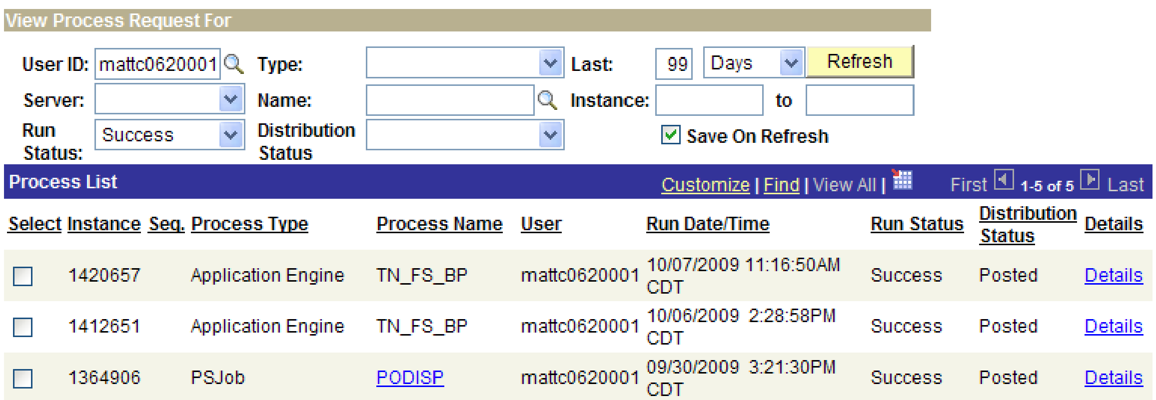
1. Click on FSCM Process monitor.



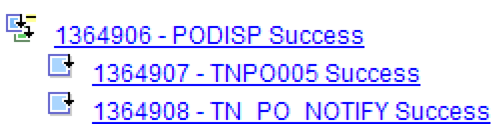
2. Confirm that your buyer id is entered into the User ID.

- Click refresh Refresh and the jobs that have ran for you within the last __ days will pull up.
    - You may edit the number of day's field.

- To find your PO make sure all the filters are blank. Click on the blue hyper link labeled PODISP. Check the run date to confirm it's the same PO.



3. Click on the second hyper link "TNPO005 Success".



4. Bottom of the screen click on "View Log/Trace".

5. Choose the middle hyper link with the .pdf.

File List

Name	File Size (bytes)	Datetime Created
SQR_TNPO005_1364907.log	1,723	09/30/2009 3:22:08.000000PM CDT
tnpo005_1364907.PDF	2,625	09/30/2009 3:22:08.000000PM CDT
tnpo005_1364907.out	124	09/30/2009 3:22:08.000000PM CDT

- Note: On the PO screen, if your dispatch method was set to *Dispatch Method: Email then the .pdf PO **<u>will not</u>** be present in the above screen and you will not be able to print the PO.

6. The PO will open.

Purchase Order

Agriculture
Call for Shipping Information
United States

Dispatch via Print

Purchase Order	Date	Revision	Page
32501-0000003399	09/28/2009		1

Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST

Buyer	Phone	Currency
Matthew C Ross	615/253-2316	USD

Vendor: 0000117909
Green Wave, Inc.
DBA: Auction Generated Address 1
4858 Hwy 106 N
Danielsville GA 30633

Ship To: OZIER ROAD
PINSON TN 38366
United States

Bill To: Call for Shipping Information
United States

Tax Exempt? N **Tax Exempt ID:** **Replenishment Option:** Standard

Line-Sch	Item/Description	Mfg ID	Quantity UOM	PO Price	Extended Amt	Due Date
1- 1	Loblolly Pine Cone Harvest		2,000.00BU	15.40	30,800.00	09/28/2009
			Schedule Total		30,800.00	
			Item Total		30,800.00	

Terms & Conditions

Certificate of Insurance

Specifications

Total PO Amount 30,800.00

Authorized Signature

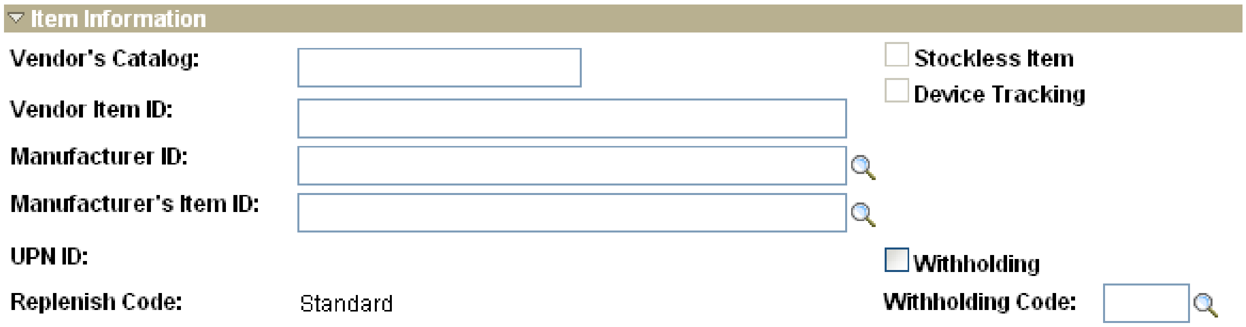
Adding Brands & Models to a PO

Brands and models do not pull over from the event onto the printed Po. In order for them to print, the info must be entered into the Line Details section for each line.

- Note: ***If the PO has already been dispatched*** Dispatch ***the brand and model field will not be available.***

1. From the main page of the PO click on the line you need to add the brand and model information.

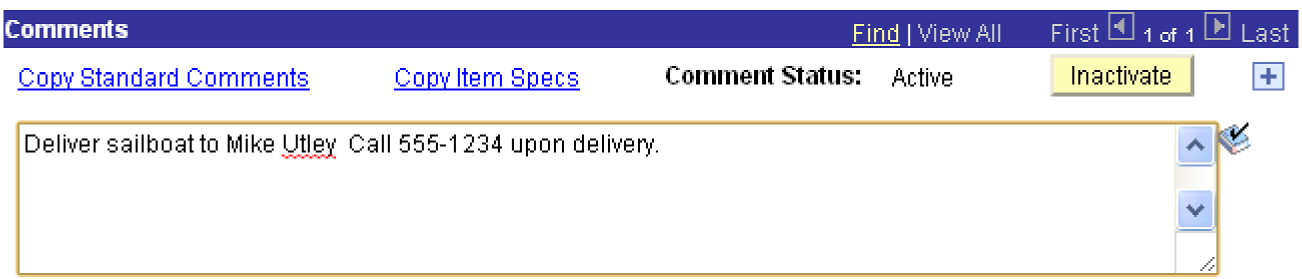
2. Click Expand All from the line details page and locate the item information. (See below)



3. Enter in the Brand and Model into the **Vendor Item ID** field. There is a **<u>20 characters limit</u>** on what will display on the PO.

Vendor Item ID: CC953402 - Vendor Part Number

- If more detailed information is required to print on the PO, access the line comment section by clicking on the line and enter the additional information. These comments will display below the line.



4. Click OK and save at the main PO page.

- Once printed with the brand and model will display above the line description.

CC953402
SAUCE,BEEF MEAT,W/TVP,9LB/BG

Tax Exempt? Y Tax Exempt ID: 62-6001445 Replenishment Option: Standard

Line-Sch	Item/Description	Mfg ID	Quantity UOM	PO Price	Extended Amt	Due Date
1- 1	CC953402 SAUCE,BEEF MEAT,W/TVP,9LB/BG	TRICOR TN	10.00BG	8.83	88.30	11/08/2010

Schedule Total 88.30

Item Total 1000071134 88.30